Workflow Management System

User Manual

Draft

Version 4.2

Recommended Browsers

Firefox 1.0.4
Netscape 7.1 and above
Interner Explorer 5.0 and above

Note : The WMS requires pop-up blocking disabled and cookies enabled to function properly.

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Introduction

The Workflow Management System (WMS) is a platform-independent, Web-accessible system for ingesting digital objects into a repository or database, creating and editing metadata for digital objects, and creating METS-XML wrappers for digital objects and the associated metadata. This innovative tool was originally created for the statewide New Jersey Digital Highway program funded by IMLS, enabling collaborative preservation of valuable cultural resources for future generations. It also supports the Rutgers University Community Repository (RUcore) for economies of scale in design and implementation.

The WMS implements a sophisticated "event-based" data model that documents significant events in the intellectual and physical lifecycle of the object. It utilizes the METS metadata encoding and transmission standard to provide users with information to manage their analog and digital objects.

The WMS is flexible, yet it only requires a web browser for use so it can be accessed and used by any type of organization. Participating libraries, museums and archives can create metadata templates for their organizations or collections, in support of local customization and export of metadata in Dublin Core for sharing with other repositories and digital collections.

Type of Objects

1. Collection Object

A collection object is a special object that contains the information about the organization that holds the collection and the description of the collection.

2. Resource Object

A resource object is an item that contains descriptive information about the resource you are digitizing, digital archival master file(s) and presentation files.

Part I: Digital Object Workflow

Workflow 1: Workflow for Project Manager

Step 1: Create a user

Step 2: Create an organization

Step 3: Create a collection

Step 4: Create a project

Step 5: Export the collection object to the repository

Step 6: Create a resource object

- Upload digital file
- Create metadata record
- Export to the repository

Workflow 2: Sample workflow for Metadata creator

Step 1: Upload file

- Locate an original file (original scan) containing a digital resource—photo, sound recording, book, document, video clip, etc.—from the local PC hard drive or from the server, and upload the file to the WMS
- Locate and upload a modified original file, i.e. a file of the same quality as the master file

Step 2: Create a metadata record

Step 3: Export the digital object to the repository

Workflow 3: Sample workflow for metadata creator

Step 1: Create a metadata record

Step 2: Upload file

- Locate an original file (original scan) containing a digital resource—photo, sound recording, book, document, video clip, etc.—from the local PC hard drive or from the server, and upload the file to the WMS
- Locate and upload a modified original file, i.e. a file of the same quality as the master file

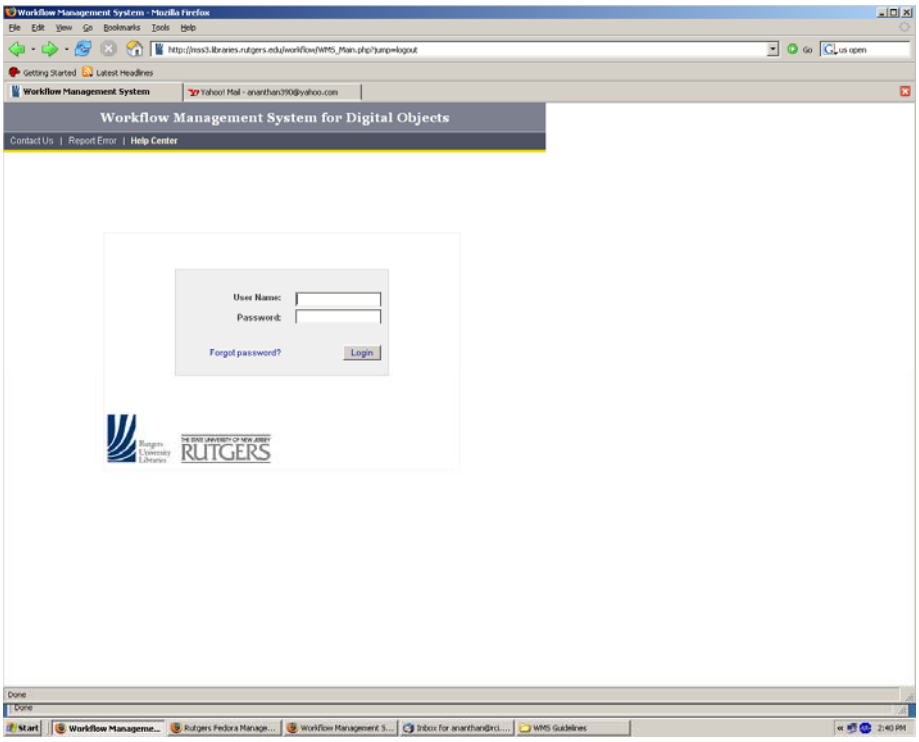
Step 3: Export the digital object to the repository

Part II: Administrative Tasks

1. Log on to the WMS as a project administrator

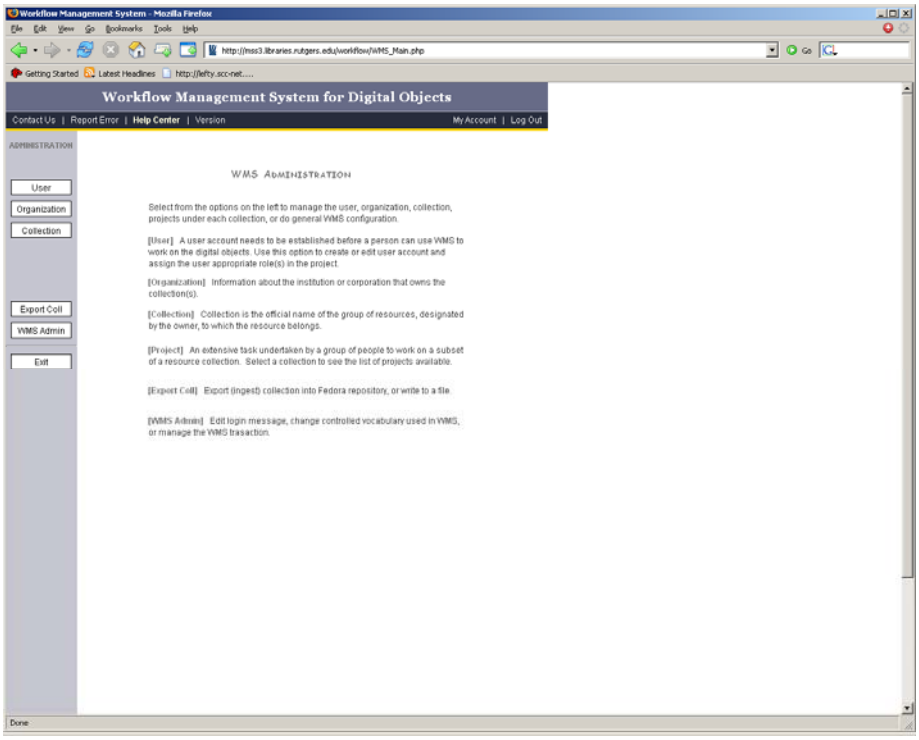
- Point your Internet browser to the WMS site: http://mss3.libraries.rutgers.edu/workflow/

Image 1.1: WMS log in screen



- On the WMS log in screen, key in the user name and password given to you by the WMS administrator.
- Select Login
- If you forgot your password, click on *Forgot password?* Enter your email address and click *Submit.* The WMS administrator will reset your password.

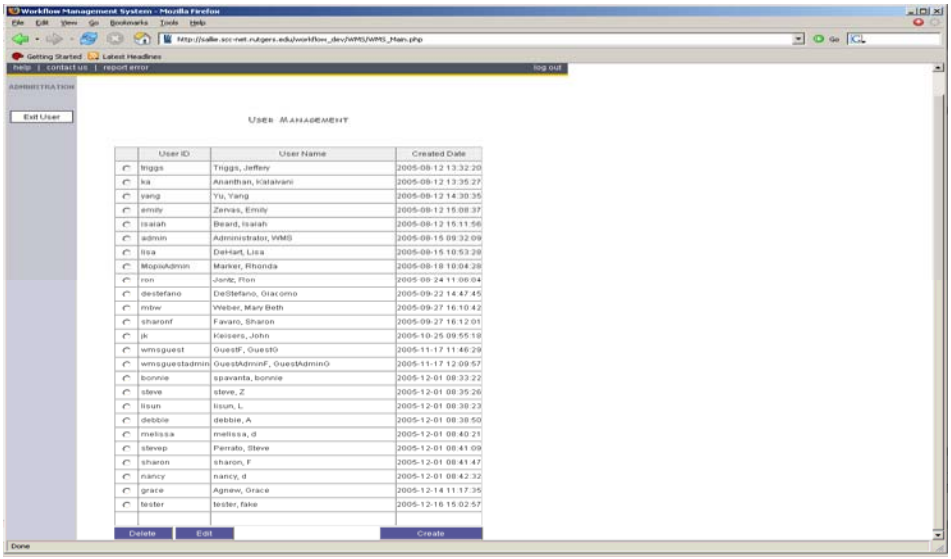
Image 1.2: Admin welcome screen



2. Create a user record

- Select *User* from the Admin welcome screen (Image 1.2)
- Select *Create*.

Image 2.1: User screen



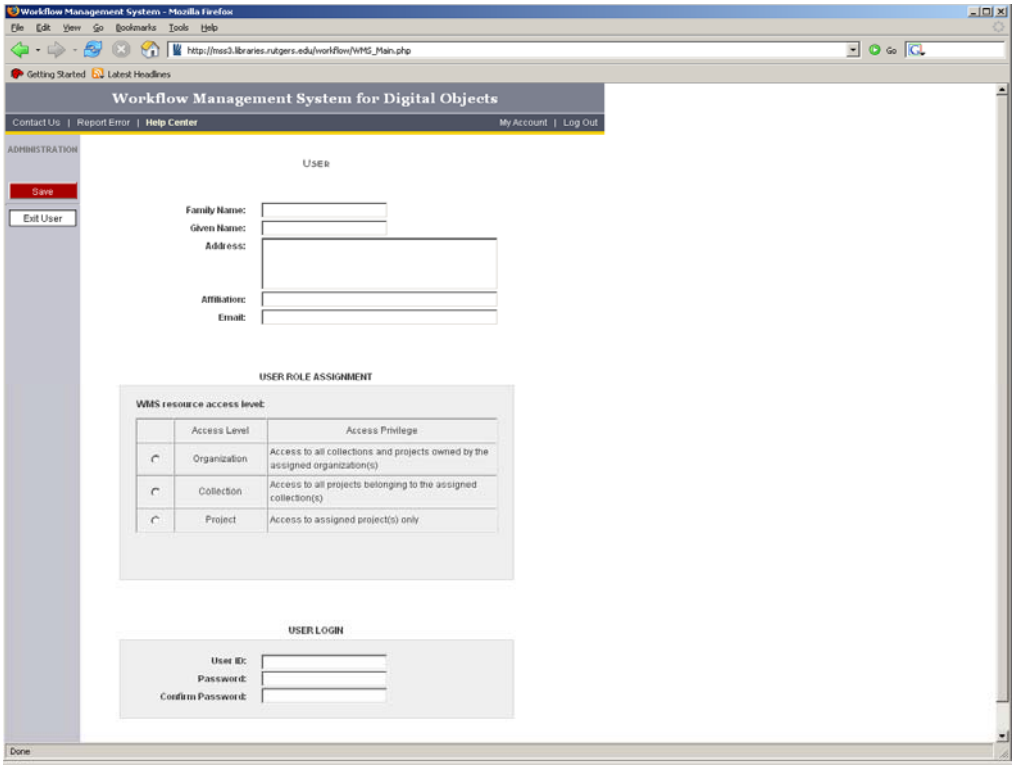
- Complete a user record for a person in your organization who will use the WMS
    - Family (last) Name
    - Given (first) Name
    - Address of the department/organization
    - Email
    - User Access Level

      Organization level -Access to all collections and projects owned by the assigned organization(s)

      Collection Level - Access to all projects belonging to the assigned collection(s)

      Project Level - Access to assigned project(s) only
    - User *Role*
    - Enter *User ID*
    - *Enter password*
    - *Confirm password*
- Select *Save*
- Repeat for each person in your organization who will use the WMS
- When you are done, select *Exit User*

Image 2.2: Create user screen



Tip 1: *contact us*, *report error, help center, my account* and *log out*

Across the top of each screen in the WMS are five choices: *contact us*, *report error, help center, my account* and *log out.* Select *contact us* to send an email to a WMS administrator. Select *help center* to view the Metadata Guidelines. Select *my account* to send an email to the WMS administrator to get a new password. Select *log out* to leave the WMS or return to the WMS log in screen.

3. Create an organization record

- Select *Organization* from the Admin Screen (Image 2)
- Select *Create*

Image 3.1: Organization screen

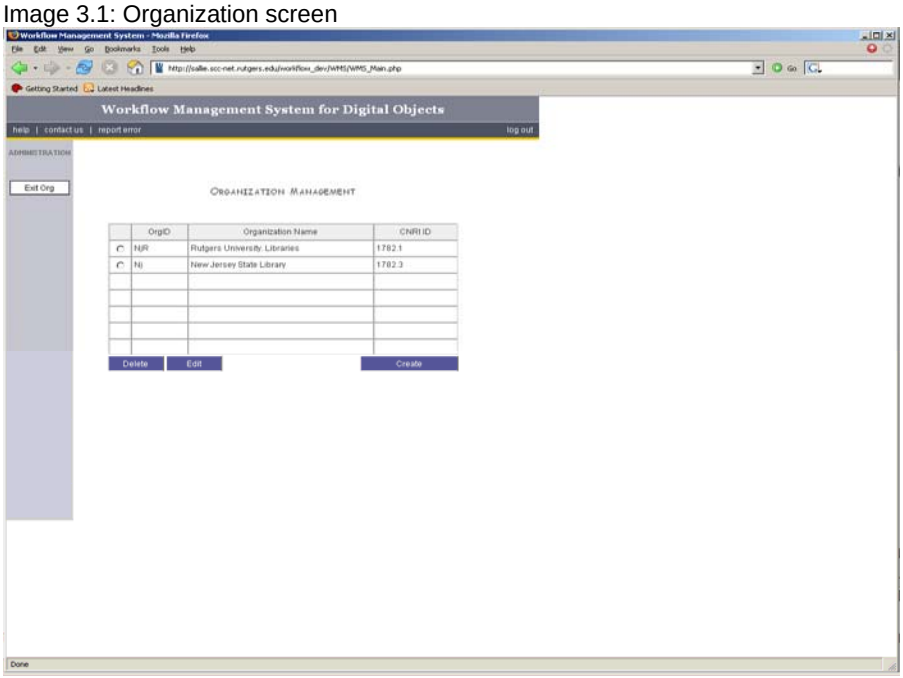
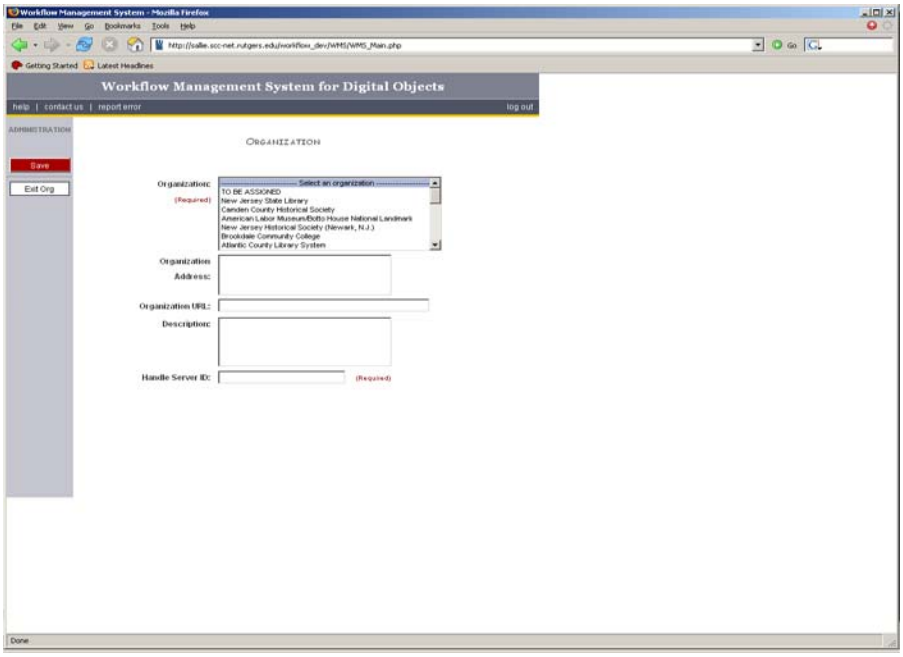


Image 3.2: Create organization screen



- Select your Organization Name (If you don't see it, please email rmarker@rci.rutgers.edu to register your organization)
- Enter Organization address
- Enter Organization URL
- Enter Description
- Enter Handle Server ID (This will be given to you by the WMS administrator)
- Select *Save*
- When you are done select *Exit Org*

Note: The metadata entered in this screen will be added to the collection object

4. Create a collection record

This function allows you to create and organize the many different collections that your organization might hold. The metadata entered in this screen will be added to the collection object. Refer to the Repository Metadata Guidelines for more details.

- Select *Collection* from the Admin Welcome screen (Image 2)
- Select *Create*
- When the collection record is complete, select *Save*
- When you are done, select *Exit Collection*

You can specify required elements for the collection when you create a collection object. Simply click on the elements listed under *Required Metadata Elements for the Collection*. The selected elements will be listed under *Specified* window. These elements are inherited to all the resource objects that belong to this collection.

To remove an element, just click on the element.

Image 4.1: Collection screen

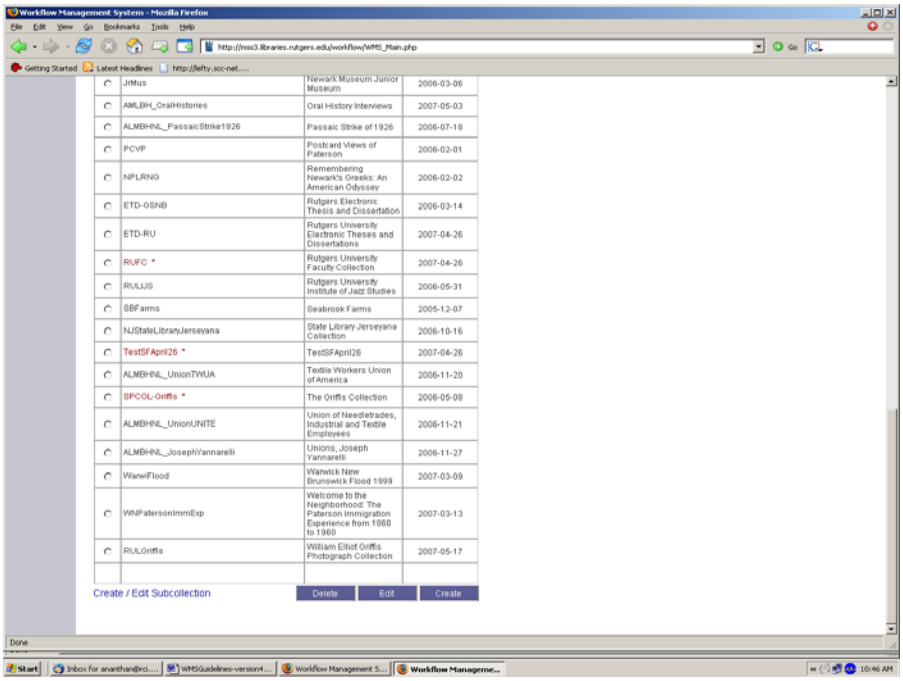
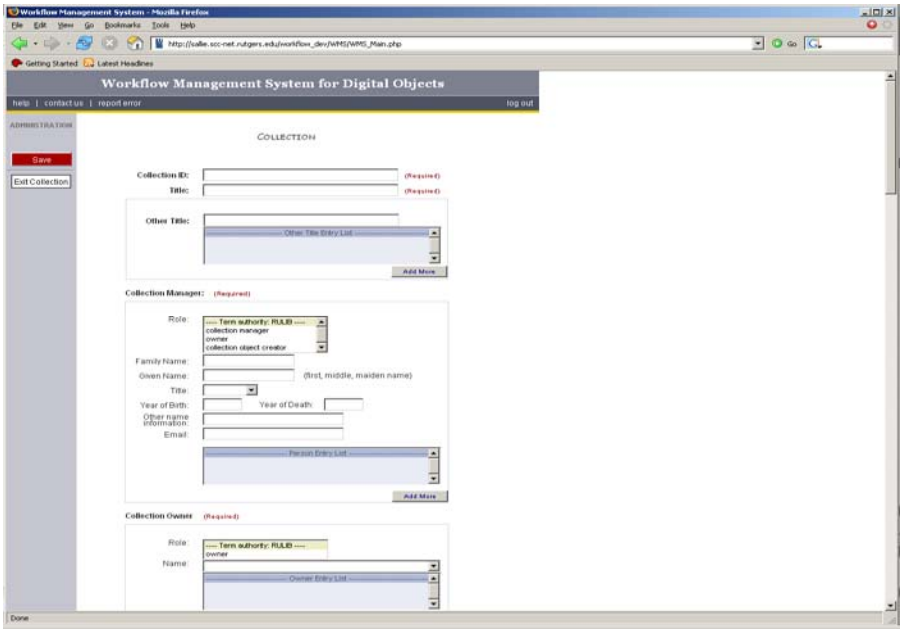


Image 4.2: Create collection screen



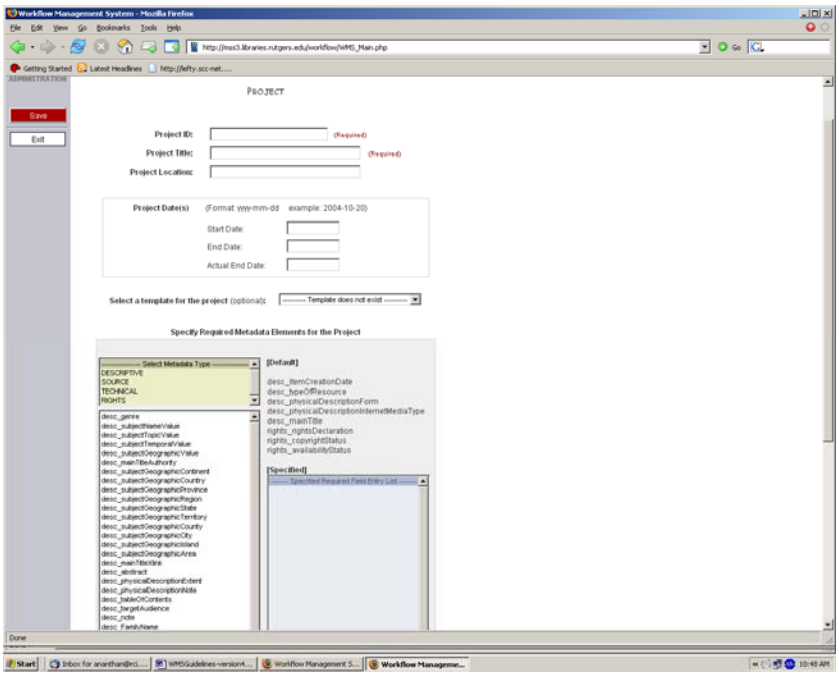
5. Create a project record

- Select *Collection* from the Admin welcome screen (Image 2)
- Select *Edit*
- Enter information about the project you are creating:
    - Select *Create Project*
    - Project ID is a short alphanumeric term with no spaces. Examples: *StMusPro1 GWSchlPhotos*
    - Enter dates

Note: The metadata entered in this screen will help the Project Managers to monitor their projects in WMS.

- When the project record is complete, select *Save*
- When you are done, select *Exit Project*

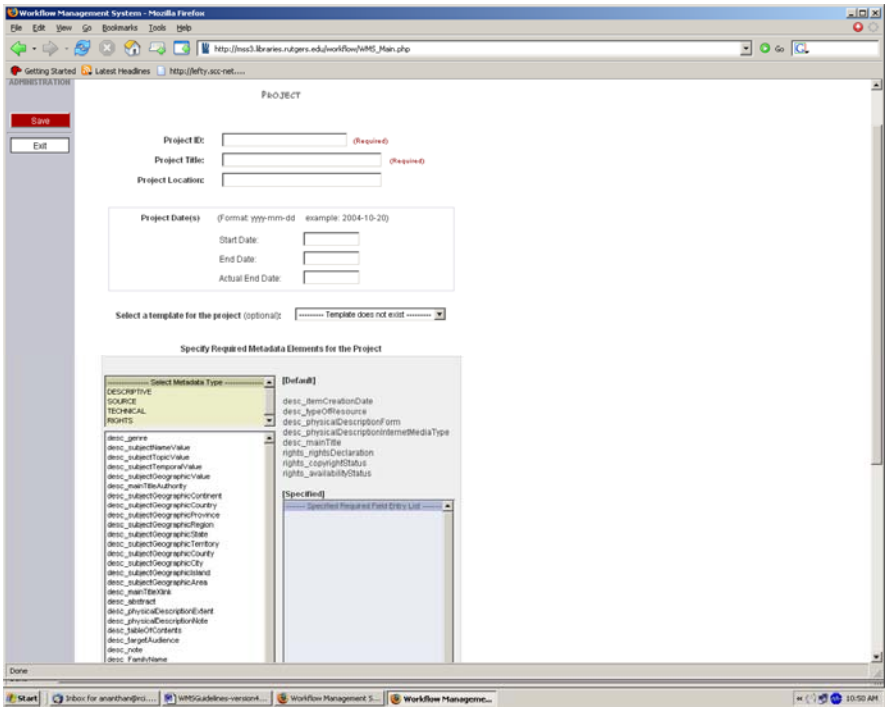
Image 5.1: Project screen



Tip 2: User authentication and authorization in the WMS

The WMS administrator creates one administrator account for the organization and gives the log in and password to the organization. Project managers have authorization to create users (except administrative users), collections and projects; to revise their organization record as well as all authorizations granted to project users. When a project manager logs in, he or she sees the Admin welcome screen. The project manager, in turn, may create user records for the people who will work on projects. Project users have authorization to upload files, create metadata records and export digital objects to the repository. When a project level user logs in, he or she sees the User welcome screen

Image 5.2: Create Project Screen



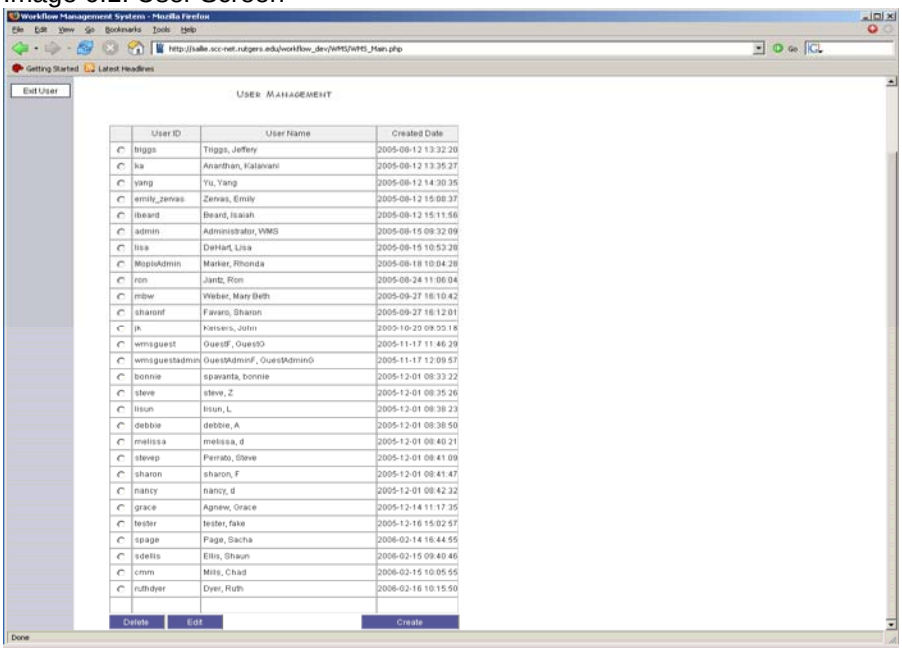
You can specify additional required elements for the project when you create a project object. Simply click on the elements listed under *Required Metadata Elements for the Collection*. The selected elements will be listed under *Specified* window. These elements are inherited to all the resource objects that belong to this project.

To remove an element, just click on the element

6. **Edit a user record**

- Select *User* from the Admin welcome screen (Image 1.2)
- Select the *User* you want to edit
- Select *Edit*
- Edit the fields
- Select *Save*

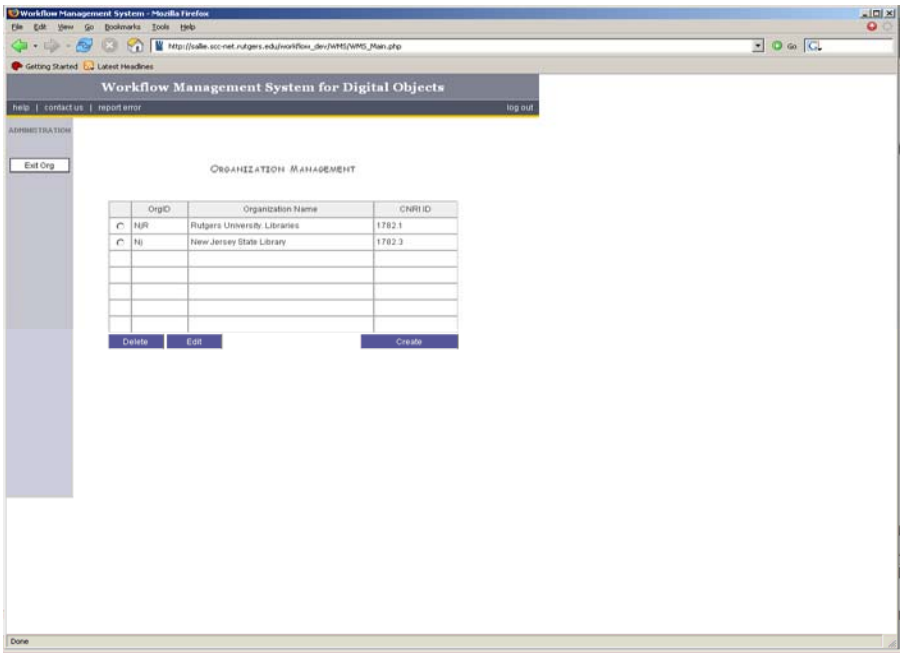
Image 6.1: User Screen



7. **Edit an organization record**

- Select O*rganization* from the Admin welcome screen (Image 1.2)
- Select the O*rganization* you want to edit
- Select *Edit*
- Fill in new data (NOTE: Handle ID is not editable)
- Select *Save*

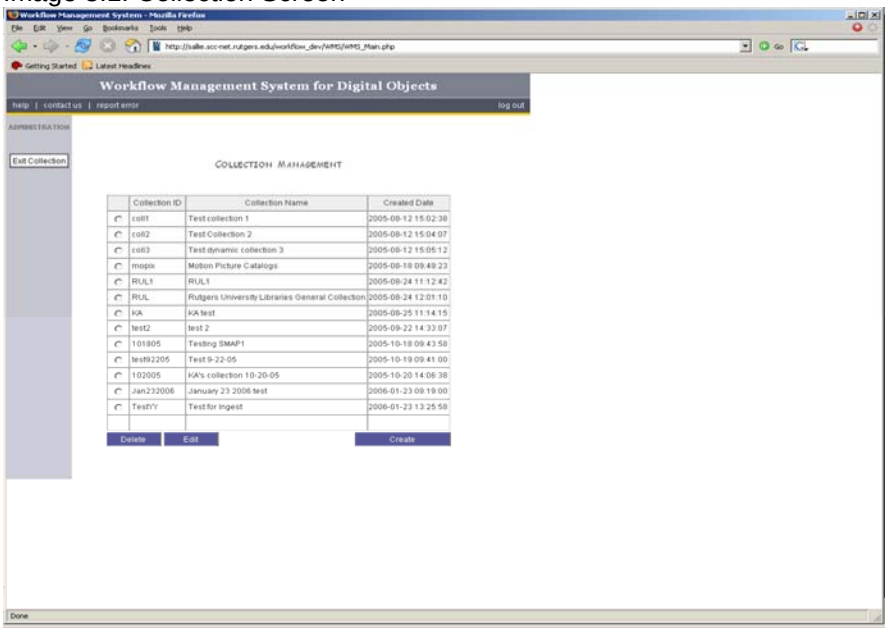
Image 7.1: Organization Screen



8. Edit a collection record

- Select *Collection* from the Admin welcome screen (Image 1.2)
- Select the *Collection* you want to edit
- Select *Edit*
- Fill in new data
- Select *Save*

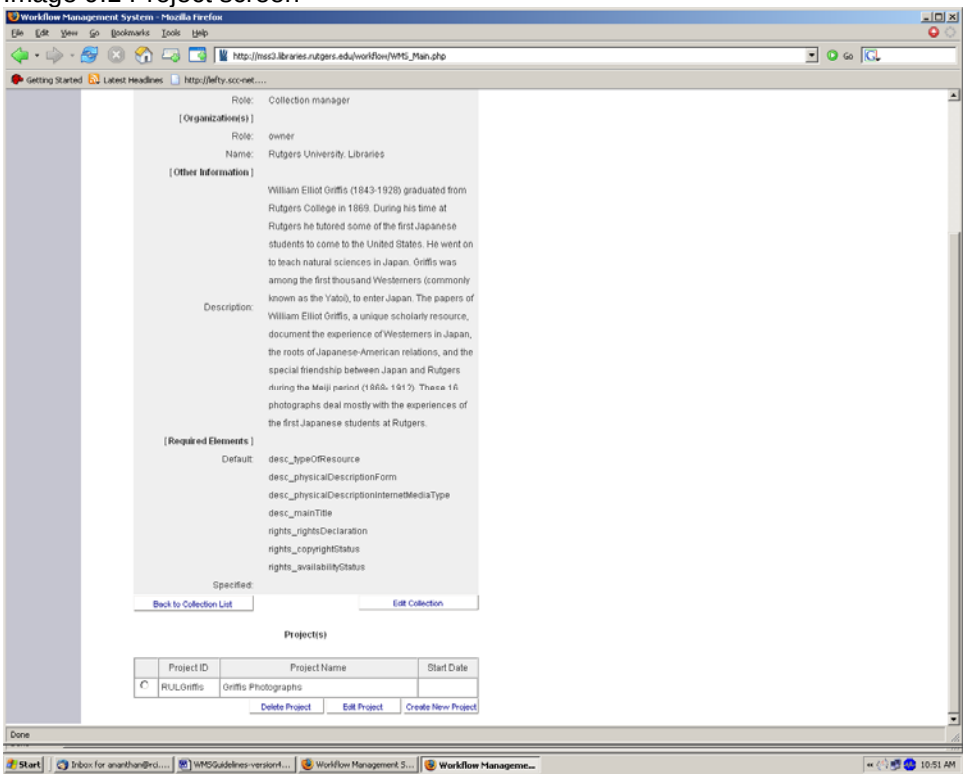
Image 8.1: Collection Screen



9. Edit a project record

- Select *Collection* from the Admin welcome screen (Image 1.2)
- Select *Edit*
- Select the *Project* you want to edit
- Select *Edit*
- Fill in new data
- Select *Save*

Image 9.1 Project screen

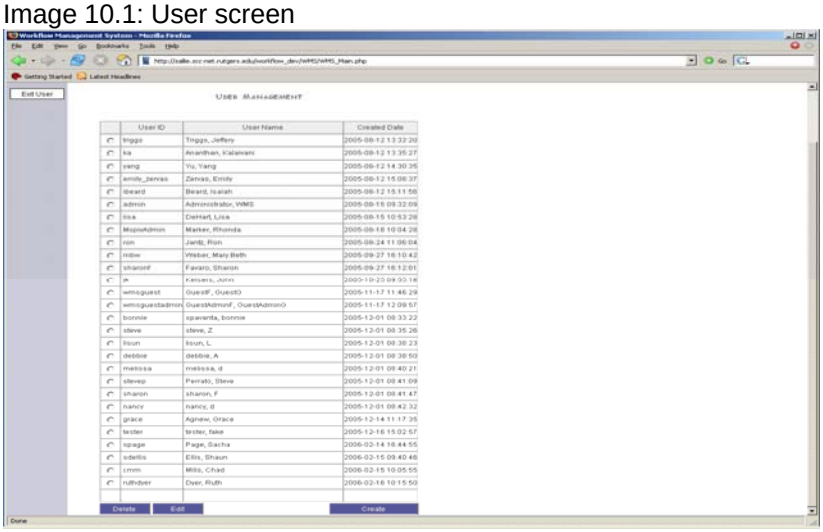


10. Delete a user record

Warning: This option will delete the user record permanently from the WMS database.

- Select *User* from the Admin welcome screen (Image 1.2)
- Select the *User* you want to delete
- Select *Delete*

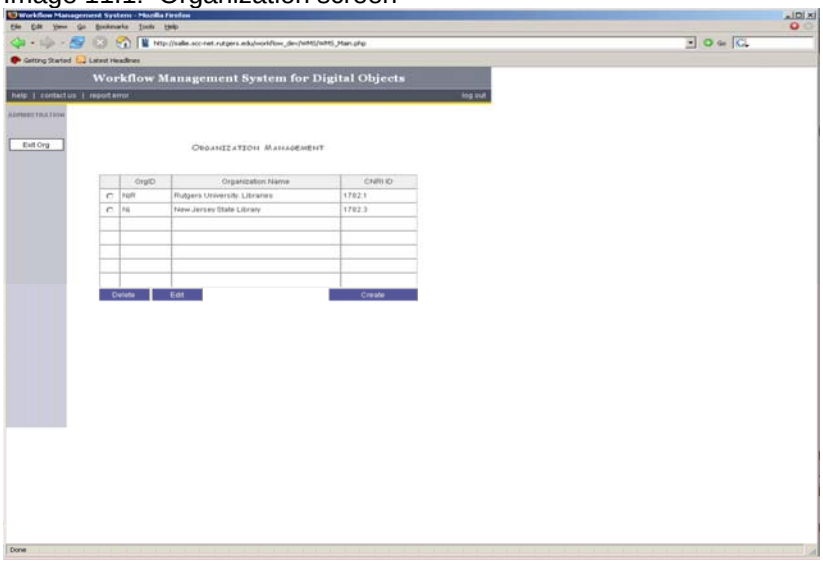
Image 10.1: User screen



11. Delete an organization record

Warning: This option will delete the organization record permanently from the WMS database. DO NOT delete the organization record if there are already collections created for this organization.

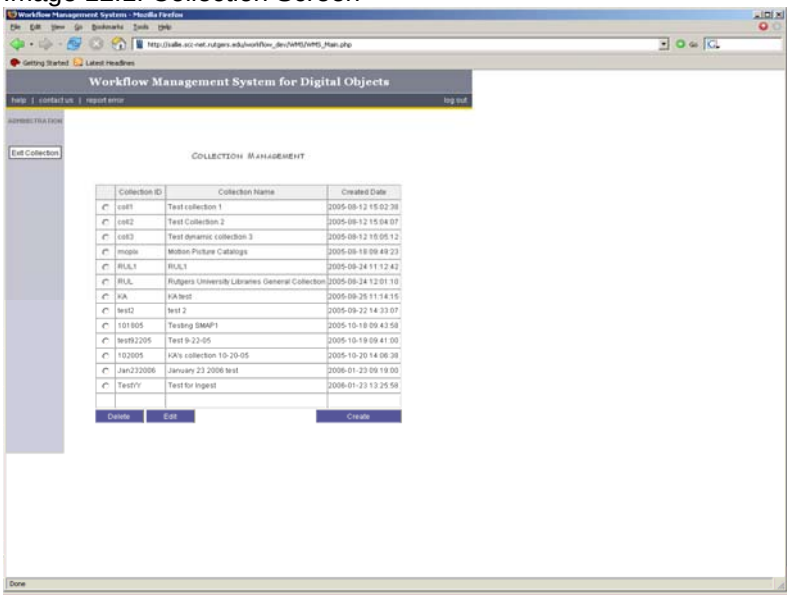
Image 11.1: Organization screen



12. Delete a collection record

Warning: This option will delete the collection record, permanently from the WMS database. DO NOT delete the collection record if there are projects created for this collection.

Image 12.1: Collection Screen



13. Delete a project record

Warning: This option will delete the project record permanently from the WMS database. DO NOT delete the project record if there are resources created for this project.

14. Export a collection object

- Select *Export* from the Admin screen
- Select *To Fedora*
- Select *Preview* to view the metadata in text format
- Select *Preview (xml)* to view the metadata in xml format
- Select Sent to Repository. You will get a confirmation screen if the collection object is exported successfully.
- Select *Next* to go to next page
- Select *Previous* to go to the previous page
- Enter a number and select *Refresh/Top* to change the number of objects to display per page

Image 14.1: Export screen

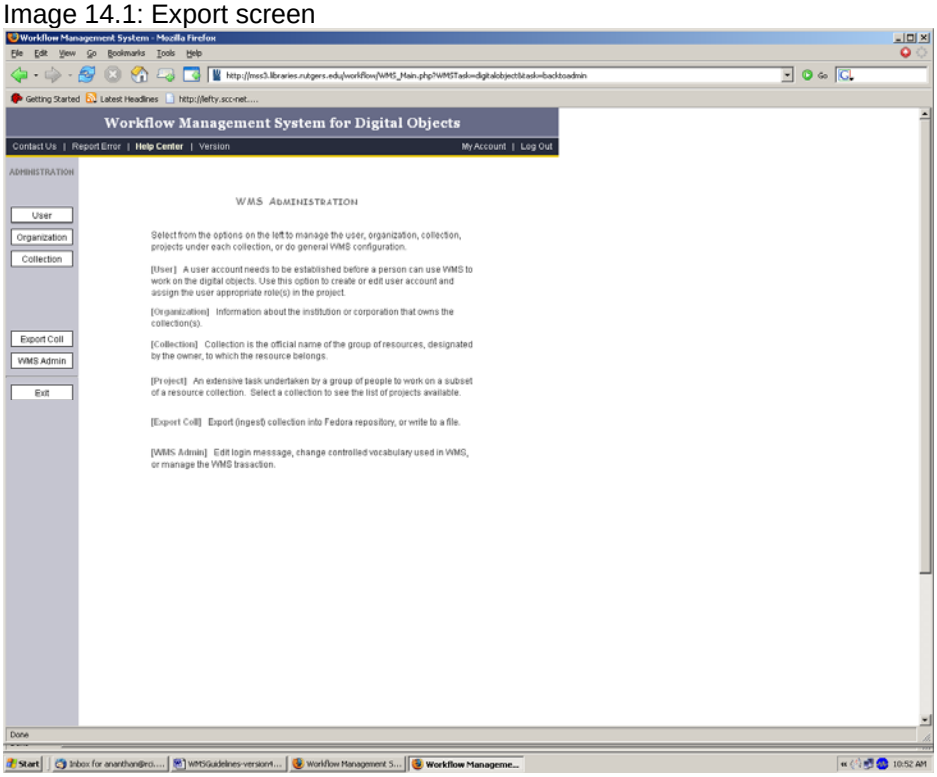


Image 14.2: Preview Screen

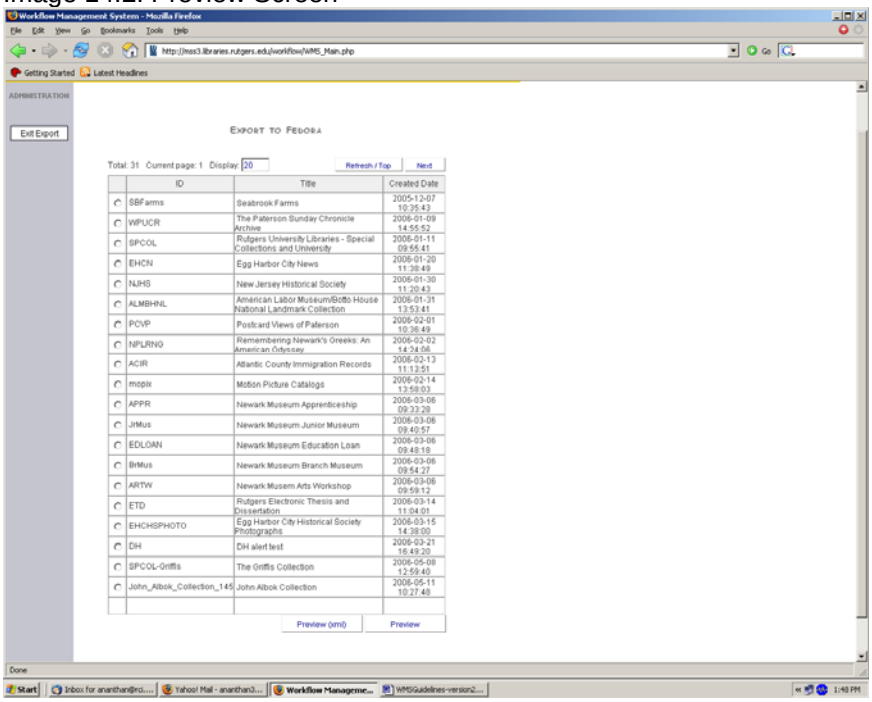
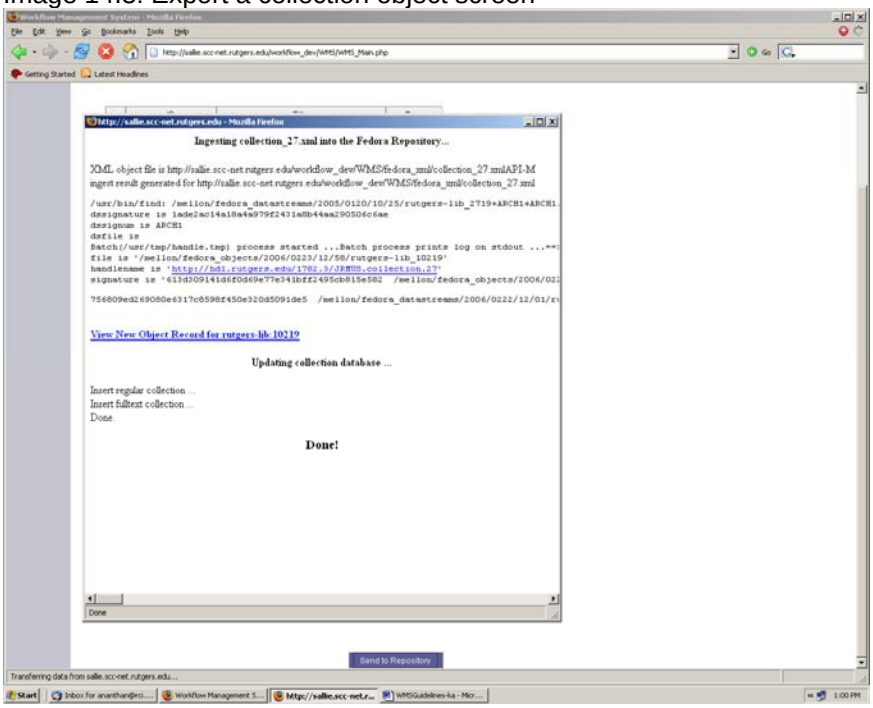


Image 14.3: Export a collection object screen



Part III: Metadata Creator Tasks

Basically there are three steps to create a resource object.

1) Upload a digital file
2) Create a metadata record
3) Export to the repository

The metadata creator can choose workflow that better suits their need.

Sample workflow 1:

Step 1: Upload file

- Locate an original file (original scan) containing a digital resource—photo, sound recording, book, document, video clip, etc.—from the local PC hard drive or from the server, and upload the file to the WMS
- Locate and upload a modified original file, i.e. a file of the same quality as the master file

Step 2: Create a metadata record

Step 3: Export the digital object to the repository

Sample workflow 2:

Step 1: Create a metadata record

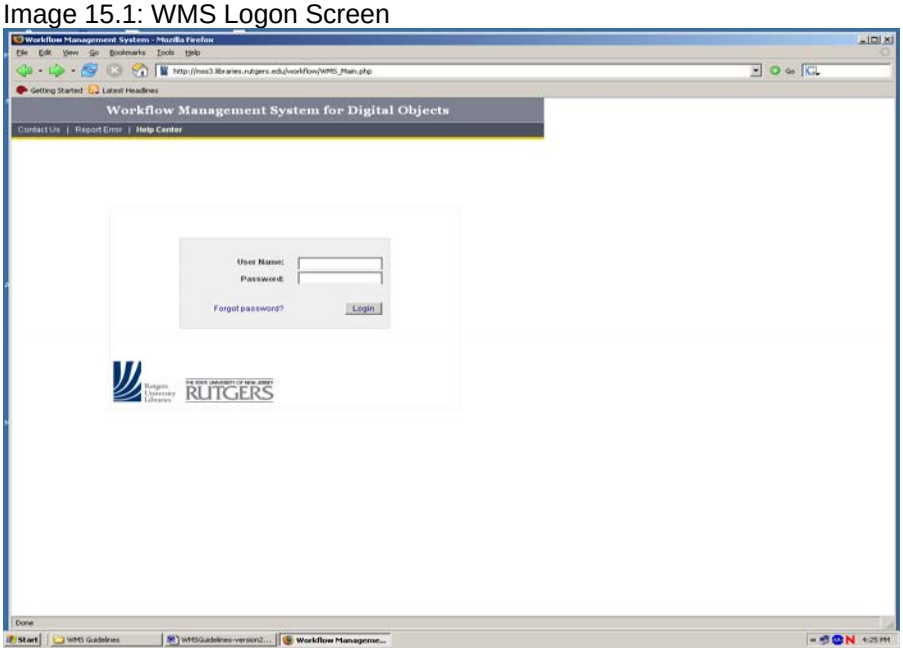
Step 2: Upload file

- Locate an original file (original scan) containing a digital resource—photo, sound recording, book, document, video clip, etc.—from the local PC hard drive or from the server, and upload the file to the WMS
- Locate and upload a modified original file, i.e. a file of the same quality as the master file

Step 3: Export the digital object to the repository

15. Log on to the WMS as a metadata creator

Image 15.1: WMS Logon Screen



- On the WMS log in screen, key in the user name and password given to you by the Project Manager.
- Select Login
- If you forgot your password, select *Forgot Password?* Enter your email address and select *Submit.*

Note: You can only log on to the WMS, if you have a project assigned for your username. If you don't see the title of the project you are assigned to, please contact your project Manager.

16. Upload a file

16.1 Upload a file from your local computer

From the Metadata creator screen

- Select the *Name of the Project*
- Select the *object architecture* of your object (Refer to the metadata guidelines for more information)

Image 16.1: Metadata creator screen

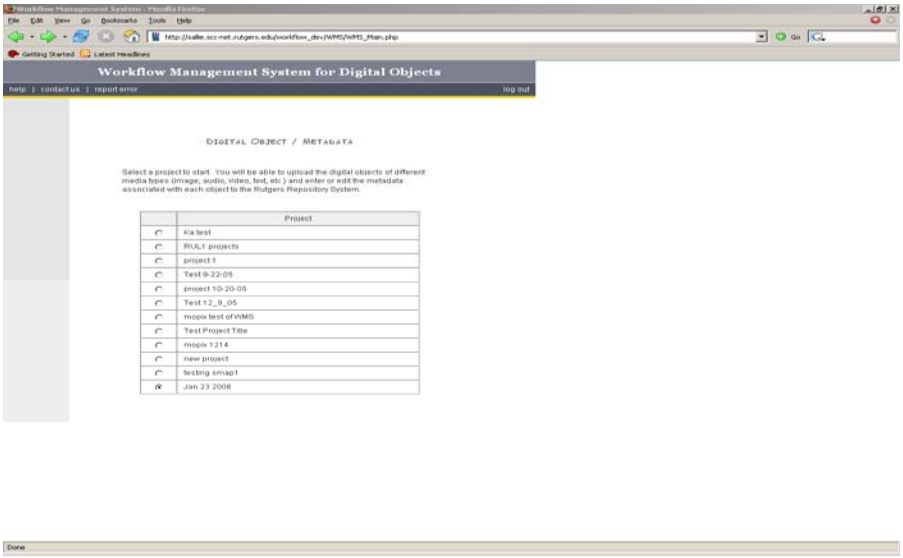
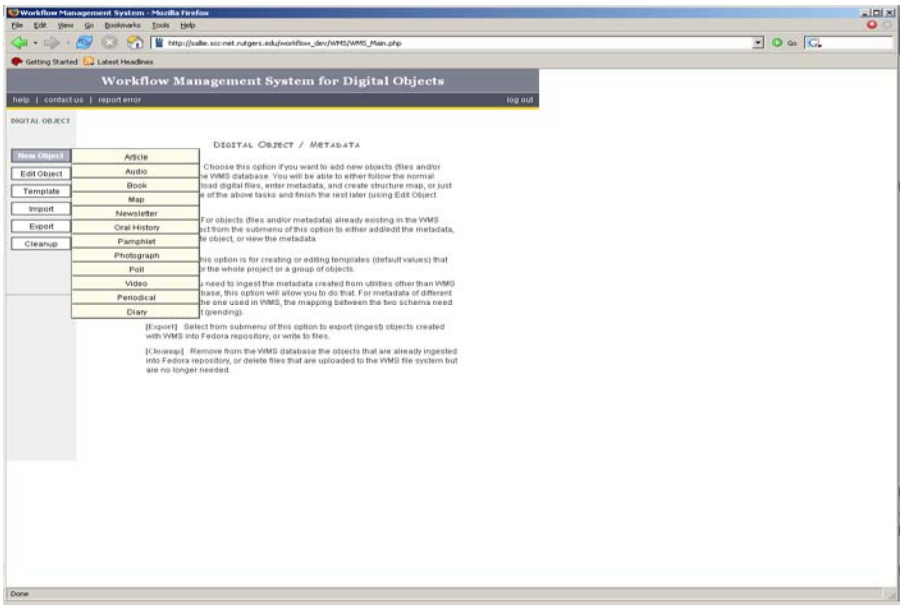


Image 16.2: Metadata creator screen 2



From the Upload digital file screen

- Enter *Item Title*
- Select *Local computer*
- Choose the file(s) you want to upload
- Click *Continue*
- Browse the local PC hard drive for the file or files
- Double click on the correct file
- Select *Upload File& Exit* to upload file only; this process will upload the digital files and create presentation files. You will get a pop-up message window similar to Image 16.5.
- Select *Upload File & Continue with Metadata* to create metadata record. You will get a pop-up message window similar to Image 16.5. **Note: Book, Manuscript, and Periodical files are processed in the background. Check the File upload status to verify that the files were uploaded successfully.**
- Select *Back* to go to the previous screen

Image 16.3: Upload digital file screen

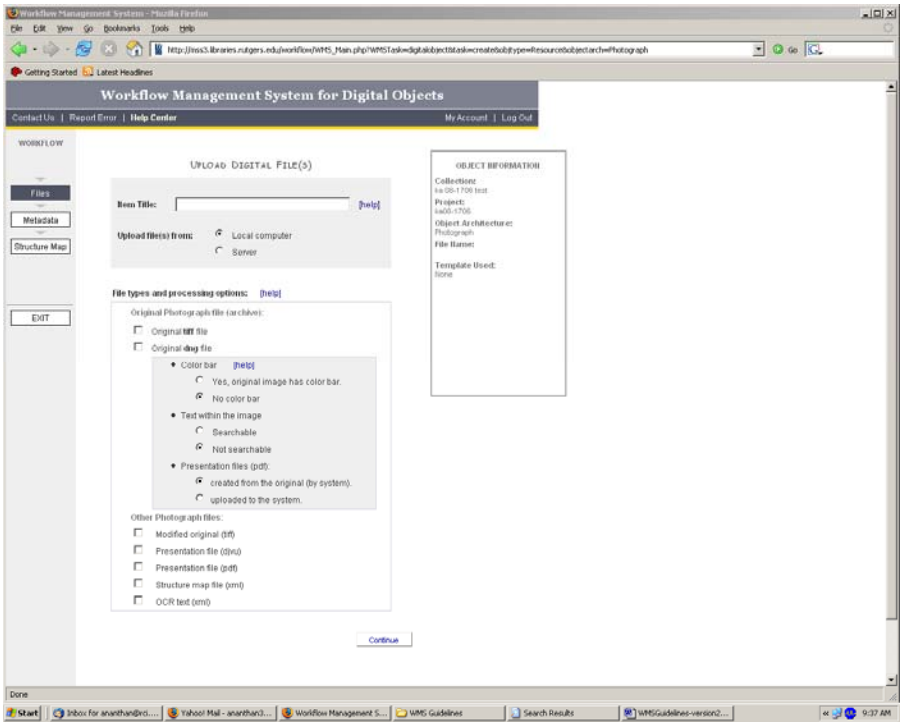


Image 16.4: Selecting a file from the local computer

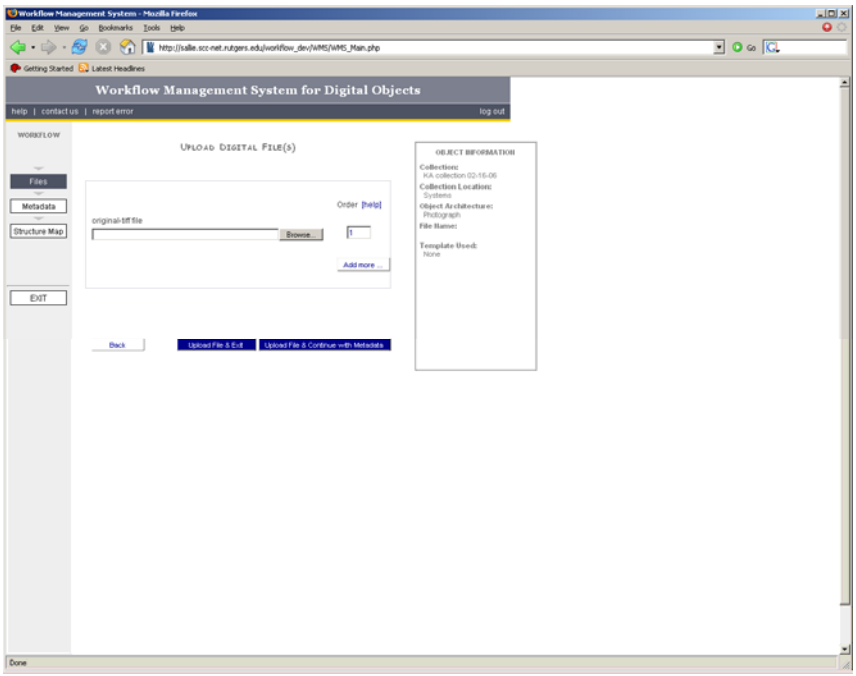
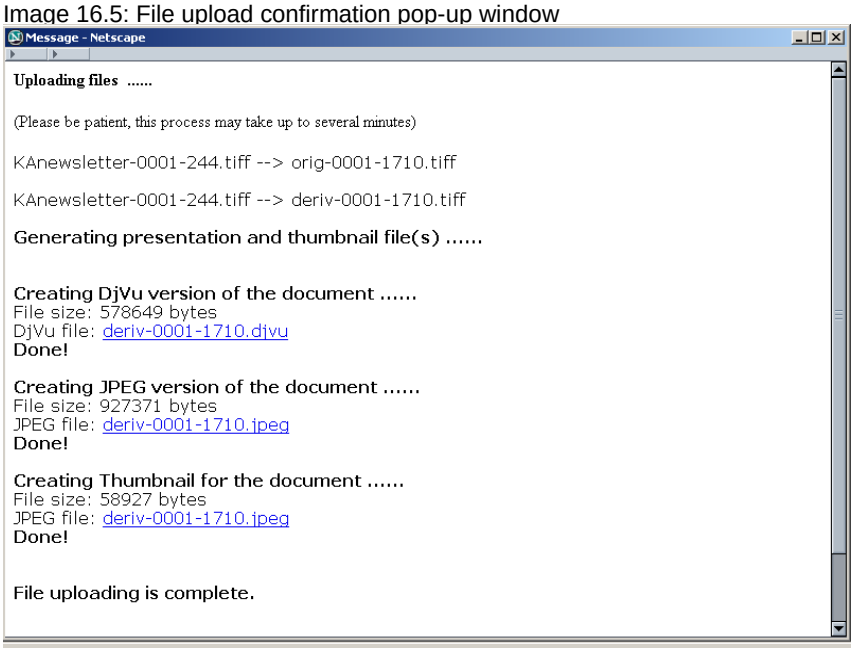


Image 16.5: File upload confirmation pop-up window



Note: Click on the links and verify that the presentation files were generated successfully.

16.2 Upload a file from the server

- Enter *Item Title*
- Select *Server*
- Choose the format of the file(s) you want to upload
- Select *No* for the prompt “Delete files from source directory when uploading is completed?”
- Select *Continue*
- Select *Browse to s*elect the *folder* to locate the file(s) (This will be provided by your Project Manager)
- Select the file(s) you want to upload
- Select *Upload File& Exit* to upload file only; this process will upload the digital files and create presentation files. You will get a pop-up message window similar to Image 16.5.
- Select *Upload File & Continue with Metadata* to create metadata record

Image 16.2.1: Upload a file from the server screen

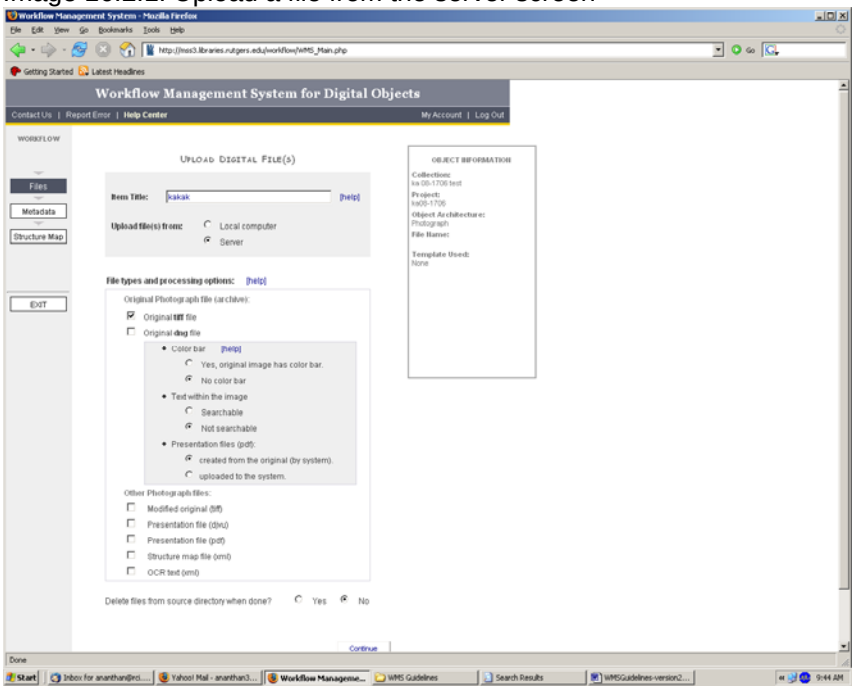


Image 16.2.2: Selecting a file from the server screen

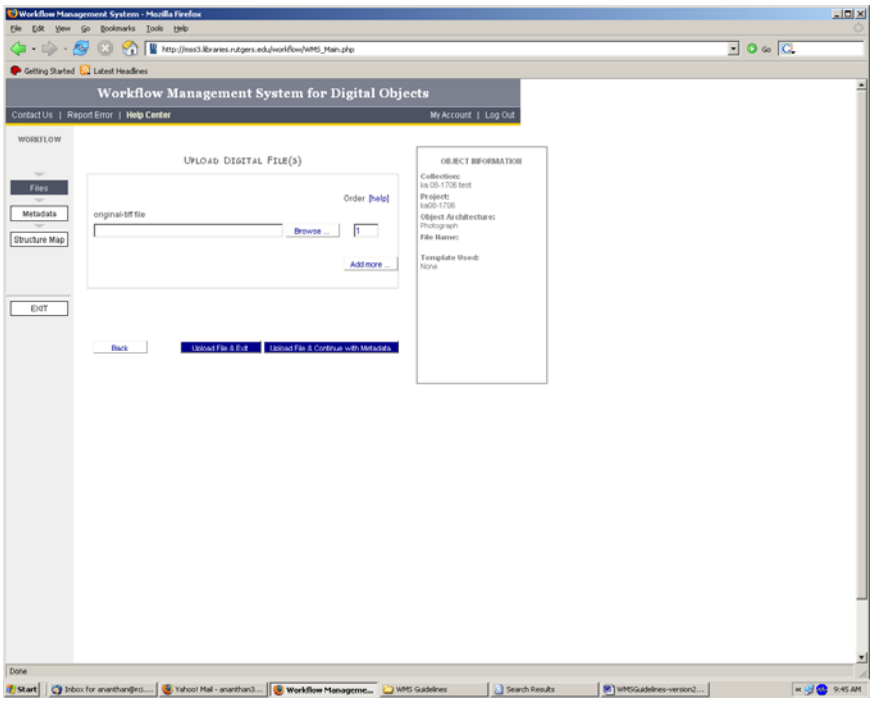
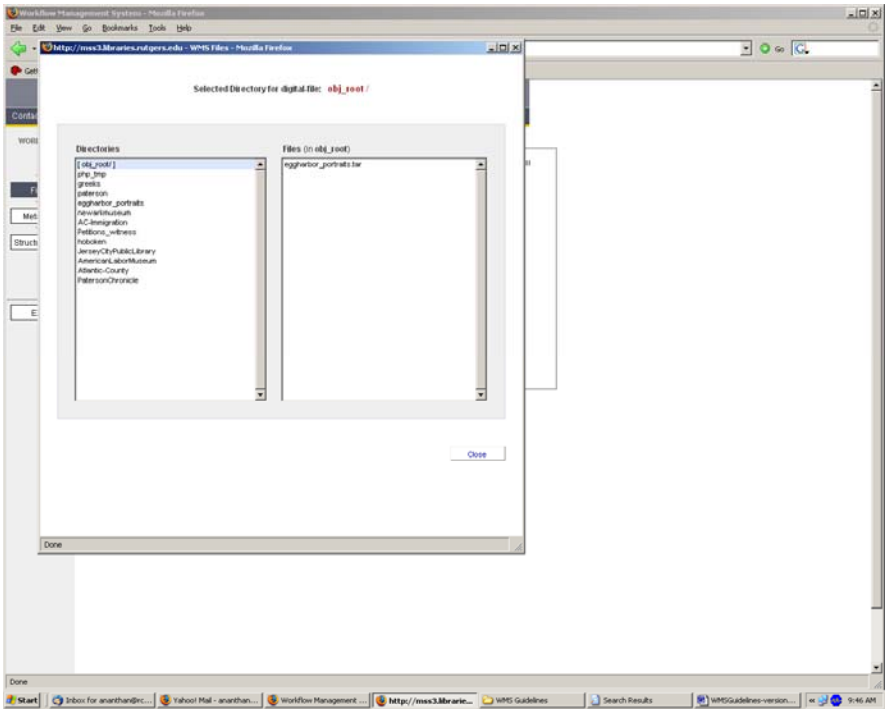


Image 16.2.3: Selecting a file from the server screen

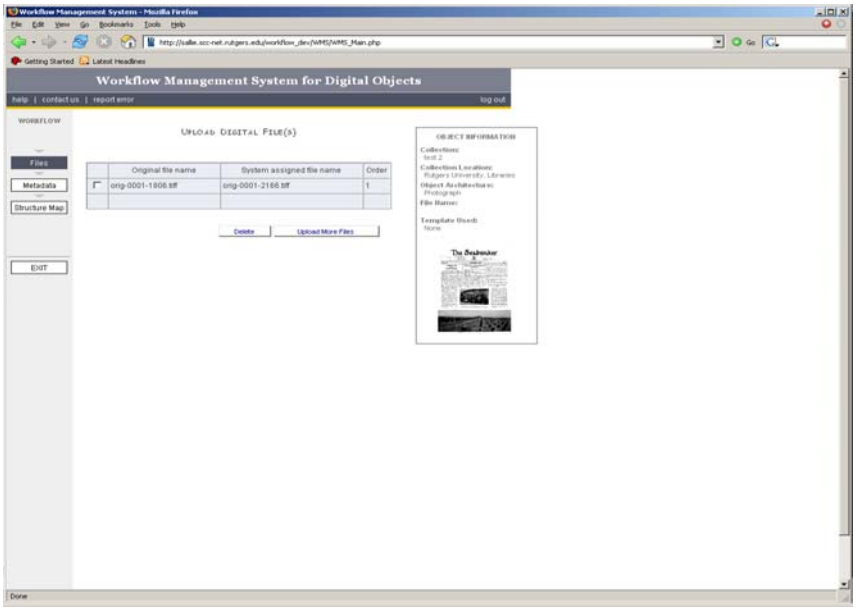


Tip 3: Pop-up windows

The WMS makes use of pop-up windows to report if a process was successful. Make sure that the Internet browser settings allow pop-up windows. To verify pop-up settings, consult your institution's system manager.

Once a file is successfully uploaded, it will appear in the Uploaded Digital Files screen. From here, you can move on to create metadata by choosing *Metadata* or choose *Exit* to upload another file.

Image 16.2.4: Uploaded Digital File(s) display screen



17. Upload multiple files

17.1 Upload multiple files from your local computer

- Enter *Item Title*
- Select *Local computer*
- Choose the *file type* you want to upload
- Select *Continue*
- Select *Add more* as many times you want (there may be a file size limit to upload files in a batch.)

- Browse the local PC hard drive for the file or files
- Double click on the correct file
- When you are done, select *Upload File& Exit,* to upload file only; this process will upload the digital files and create presentation files.
- Select *Upload File & Continue with Metadata* to upload file and enter metadata record
- Select *Back* to go to the previous screen

Image 17.1.1: Upload digital file screen

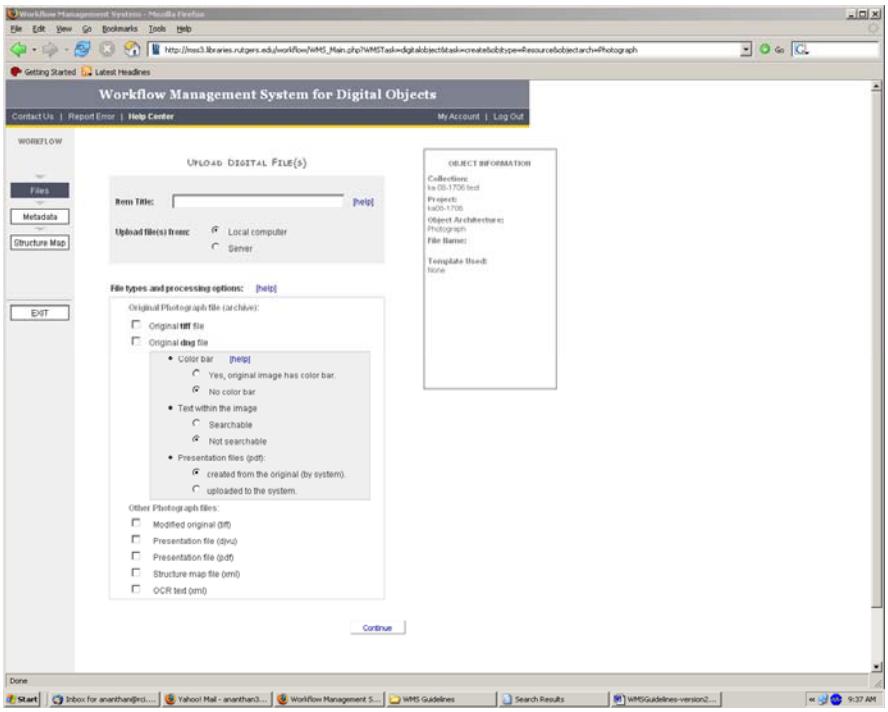


Image 17.1.2: Selecting multiple files from the local computer

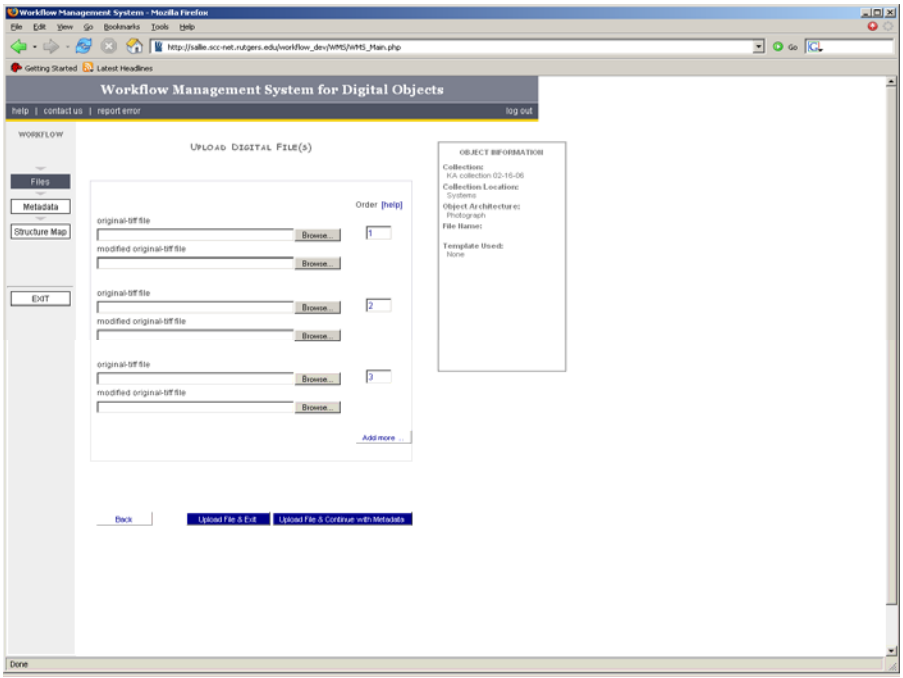
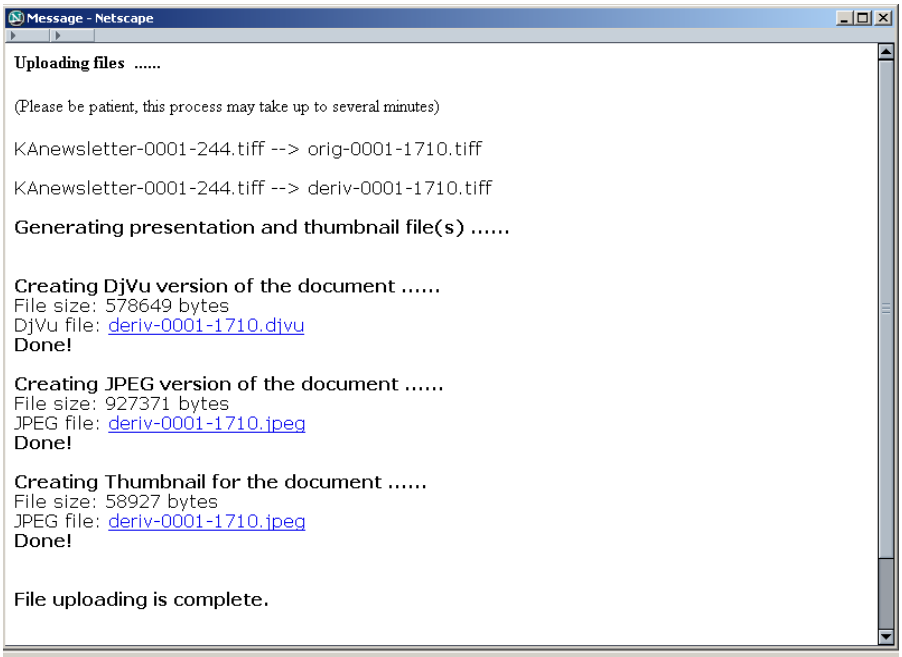


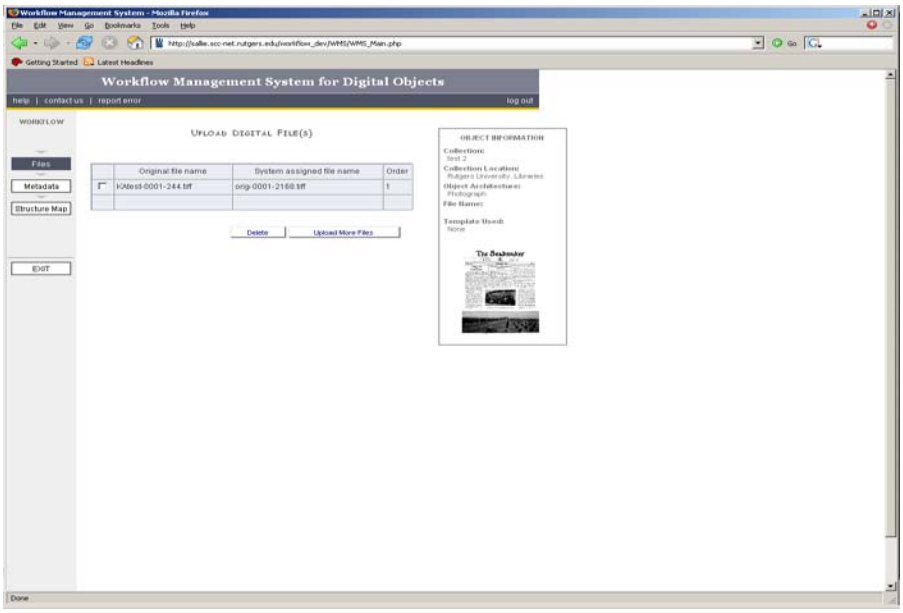
Image 17.1.3: File upload confirmation pop-up window



Note: Click on the links and verify that the presentation files were generated successfully.

Once a file is successfully uploaded, it will appear in the Uploaded Digital Files screen. From here, you can move on to create metadata by selecting *Metadata* or upload another file.

Image 17.1.4: Uploaded Digital File(s) display screen



17.2 Upload multiple files from the server

- Enter *Item Title*
- Select *Server*
- Choose the file type you want to upload (Be sure to check the appropriate options in the gray box)
- Select *No* for the prompt "Delete files from source directory when uploading is completed?"
- Select *Continue*
- Enter the *file directory* to locate the file (This will be provided by the Project Manager
- Select *Provide a list of file names* to select a range of files to upload
- Select *Specify a range of files* to set the first and the last file to upload (This option requires the file names in sequence. See the message on the screen)
- Select *Browse* to choose the files
- Select *Upload File& Exit* if you just want to upload file only.
- Select *Upload File & Continue with Metadata* if you want to create metadata record

Image 17.2.1: Upload a file from the server screen

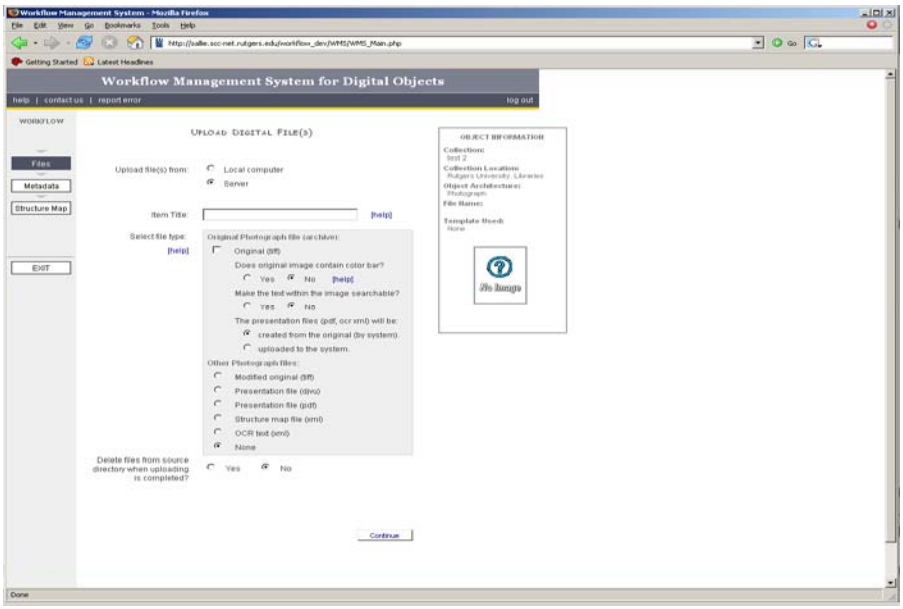


Image 17.2.2: Selecting multiple files from the server screen

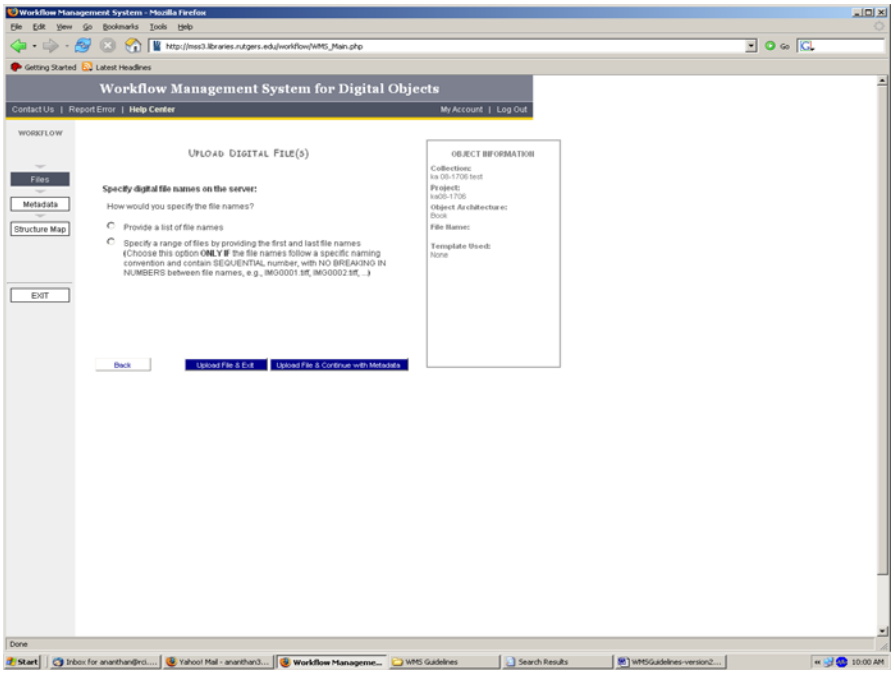


Image 17.2.3: Specify digital files screen

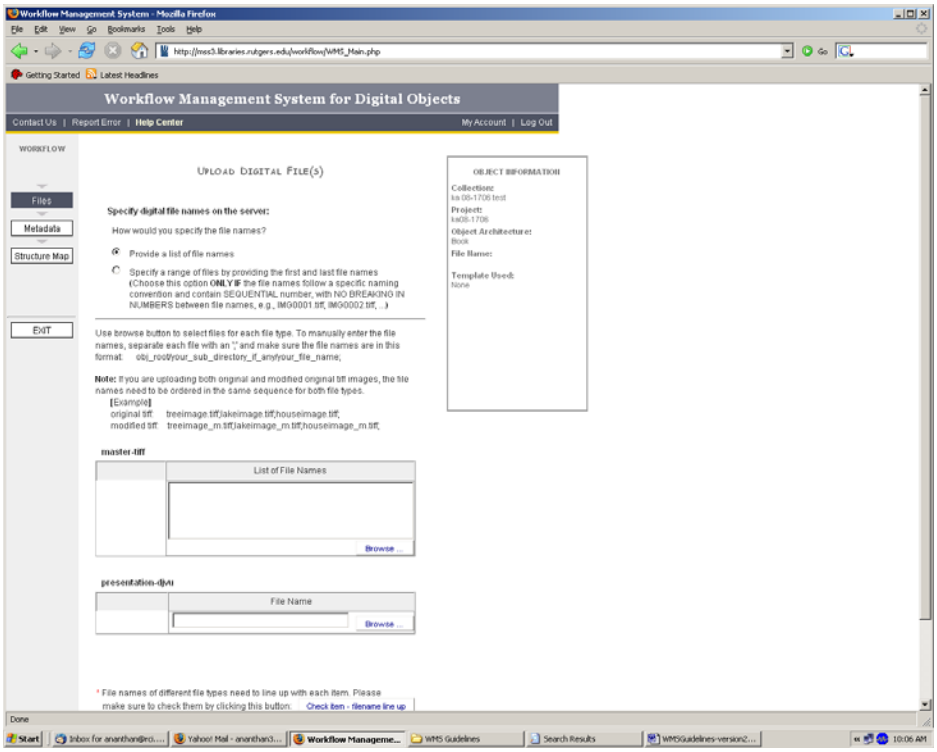


Image 17.2.4: Browse screen

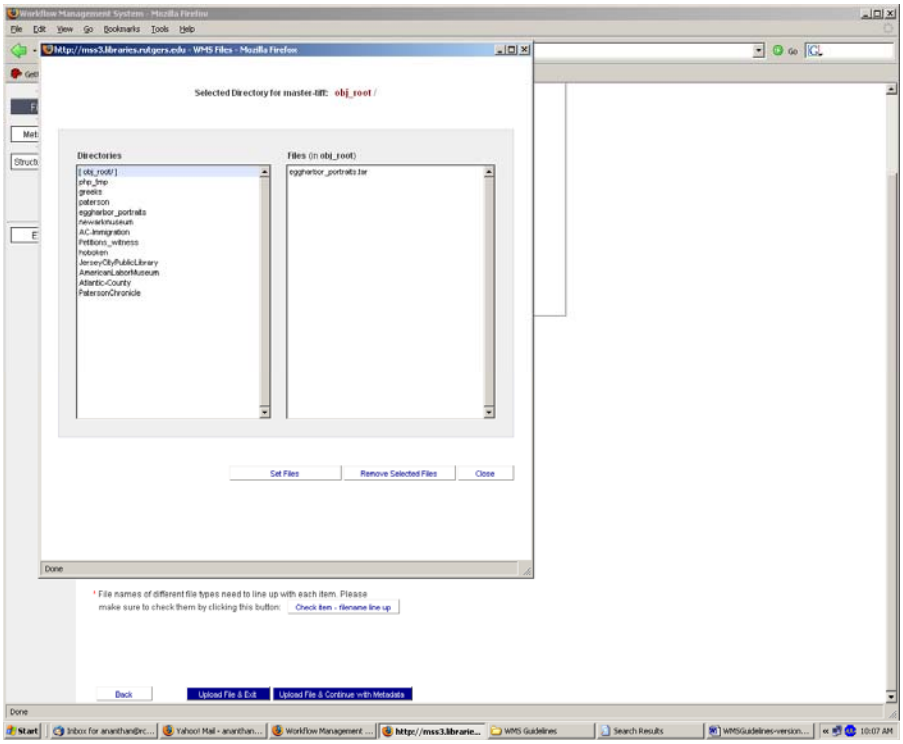
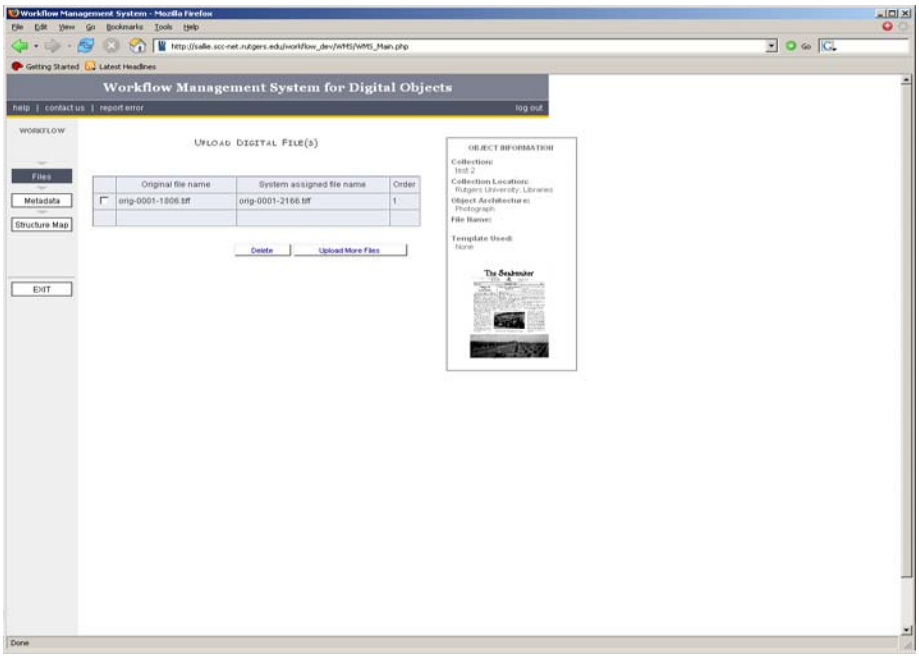


Image 17.2.5: Uploaded digital files screen



18. Upload a file to an existing metadata record

If you follow digital workflow sample 2 and created metadata record first, you need to upload the corresponding digital file.

- Mouse over *Edit Object*
- Select *Edit/View/Delete* Object
- Choose the metadata record (The status “F” in red indicates that the record does not have any associated digital files.)
- Select *Edit*
- Choose *Files*
- Follow instructions outlines under “*Upload a File*” section

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Image 18.1: View/Edit/Delete Object Screen

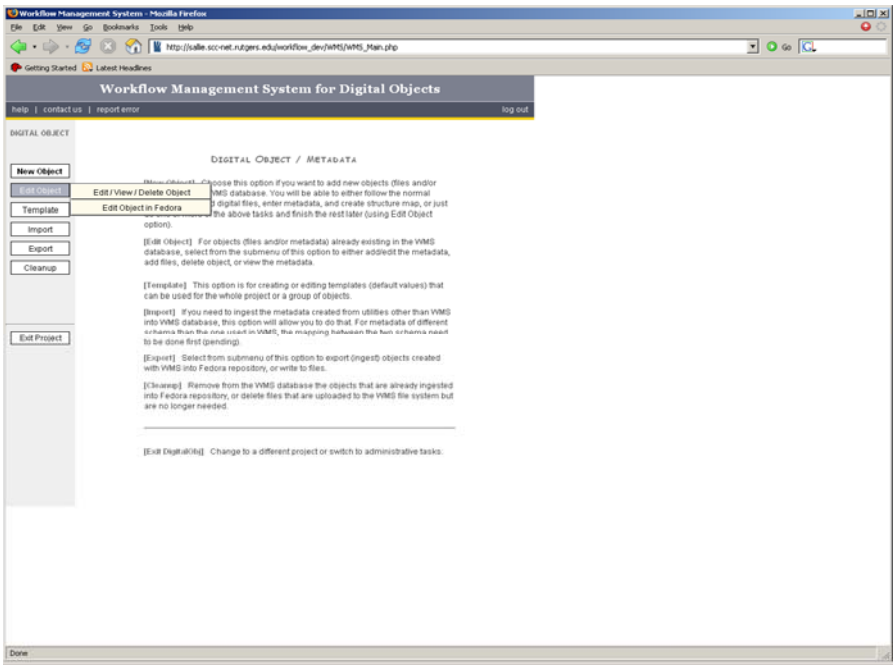
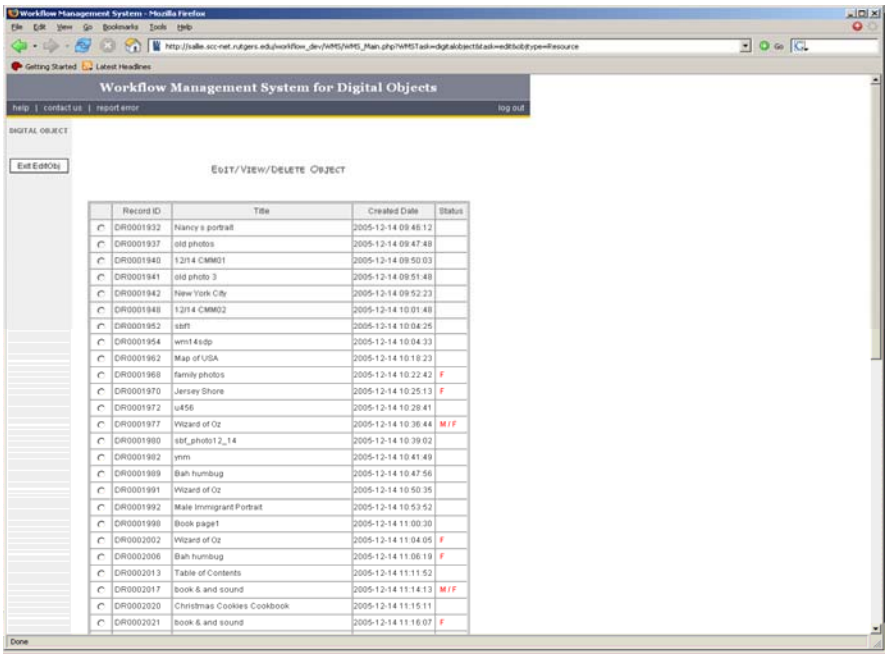


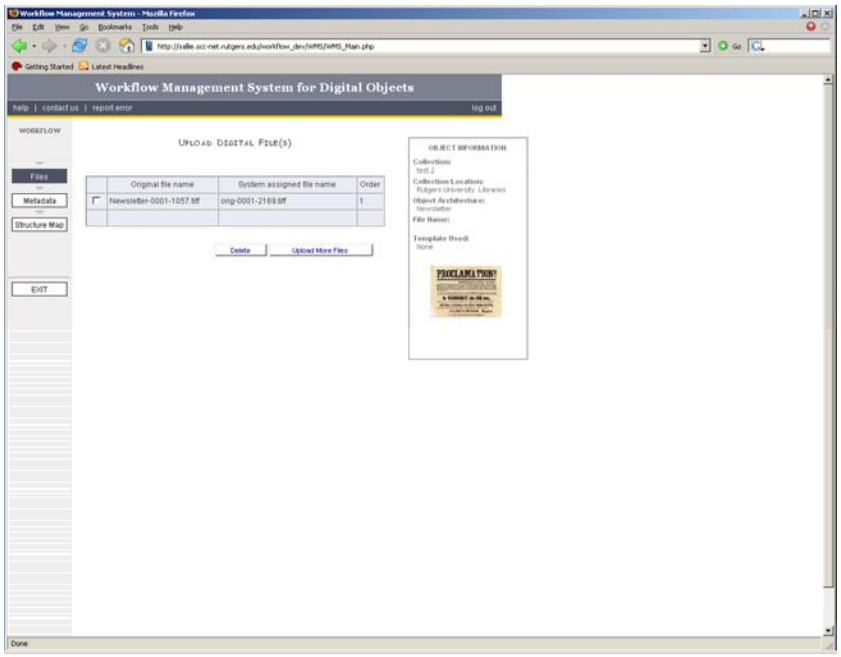
Image 18.2: Existing Metadata Record Screen



19. Upload additional file(s) to an existing record

- Mouse over *Edit Object*
- Select *Edit/View/Delete* Object
- Choose the metadata record (The status “F” in red indicates that the record does not have any associated digital files.)
- Select *Edit*
- Choose *Files*
- Select *Upload More Files*
- Follow instructions outlined under “*Upload a File”* section

Image 19.1: Upload Files screen



20. Delete previously uploaded file

- Mouse over *Edit Object*
- Select *Edit/View/Delete* Object
- Choose the metadata record (The status “F” in red indicates that the record does not have any associated digital files.)
- Select *Edit*
- Choose *Files (Image 28)*

- Choose the file you want to delete
- Select *Delete* (This will delete the master file(s) and associated presentation files permanently from the WMS server.)

Tip 4: Thumbnails

Thumbnail images in the WMS assure the user that he or she is working on the correct item. Select the thumbnail to open the item in a separate window. It will be easier to see details in this view. To return to the WMS, simply close the window.

21. Create a metadata record

21.1 Add metadata to existing digital files

- Select *Edit Object*
- Select *Add Metadata to Existing Files*
- Click on the radio button to select the object
- You will get a screen similar to Image 21.1.3. If you want to enter only the required elements, select *Display Option*
- Select *Required Elements.*
- Fill in metadata using the Repository Metadata Guidelines.
- Select *Save.*

Image 21.1.1: Add Metadata to Existing Files Screen

Image 21.1.2: Select Metadata record Screen

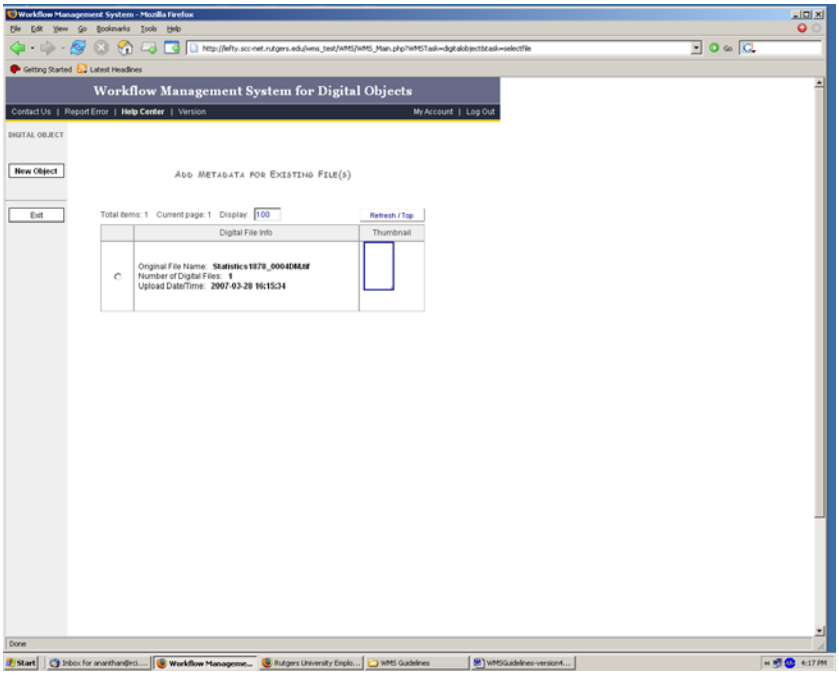
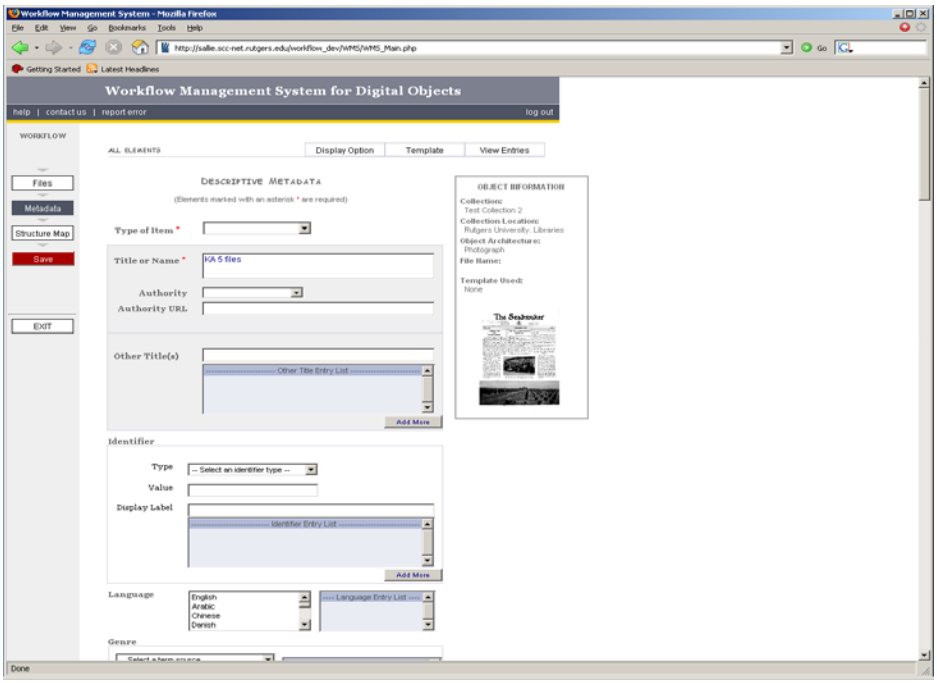


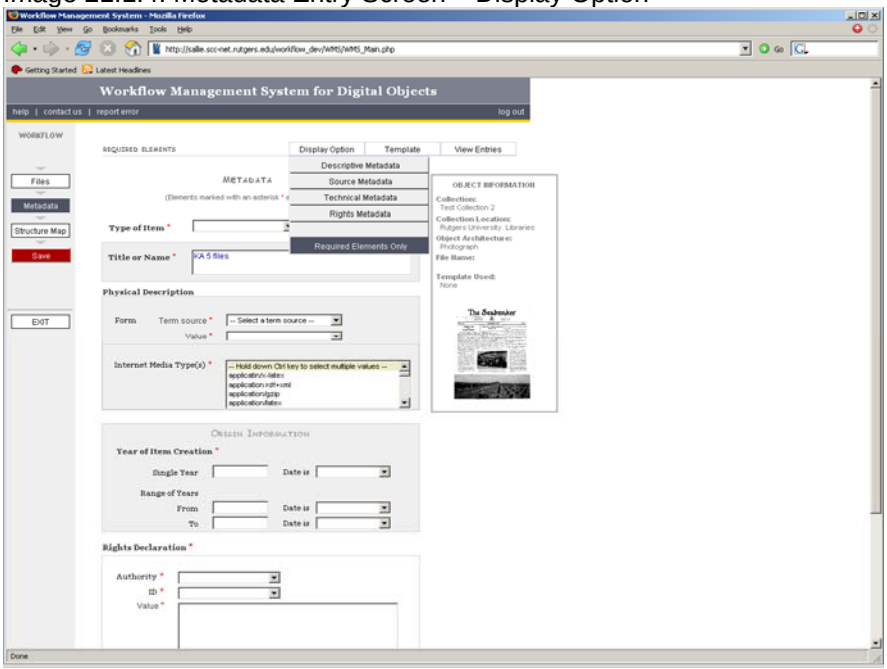
Image 21.1.3: Metadata Entry Screen



NOTE: Click on the thumbnail image to view a larger image

Display Option: This option allows you to toggle between descriptive, source, technical, rights metadata or requirement elements screen at any time when you are entering metadata.

Image 21.1.4: Metadata Entry Screen – Display Option

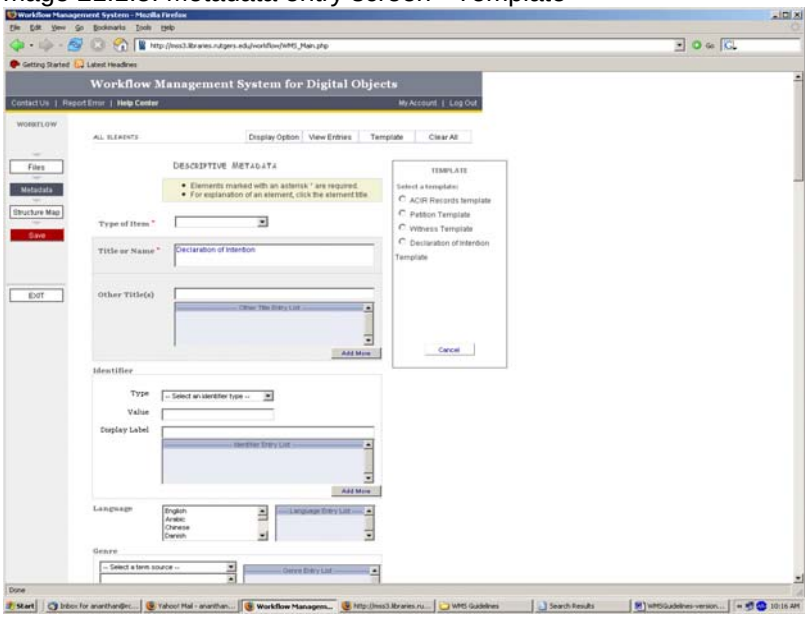


Template: This option allows you to enable/disable a template while you are entering metadata. The name of the template used to create the metadata record will be listed under *Template Used* if a template is enabled.

To enable a template:

- Select *Template*
- Select the template from the list of available templates. The name of the template will be listed under *Template Used.*

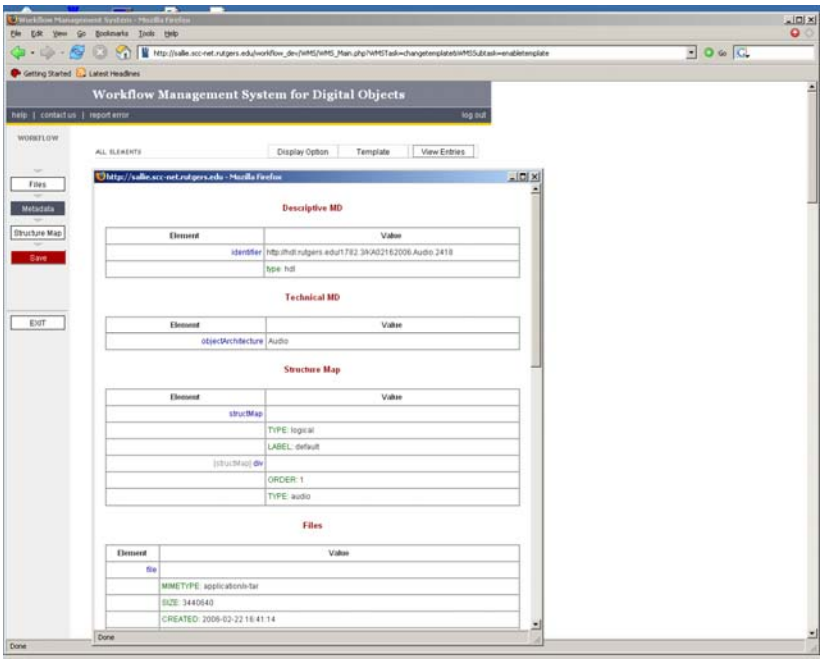
mage 21.1.5: Metadata entry screen - Template



View Entries: This option allows you to see the entire metadata record in one screen.

- Select View Entries from the tab

Image 21.1.6: View entry screen



21.2 Add Metadata without associated digital file(s)

- Select *New Object*
- Select the *Object Architecture* from the pull down list
- Select *Metadata*
- You will be presented with the metadata entry forms. Follow the instructions to create metadata record.
- Select *Save* when done.

Image 21.2.1: Create metadata without digital file

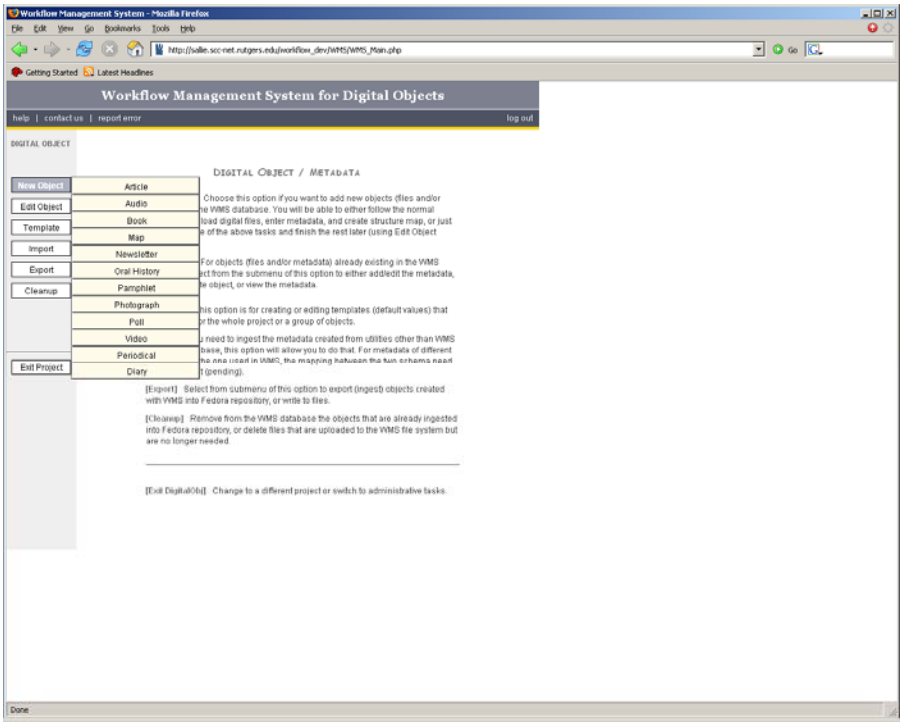


Image: 21.2.2: Create metadata screen

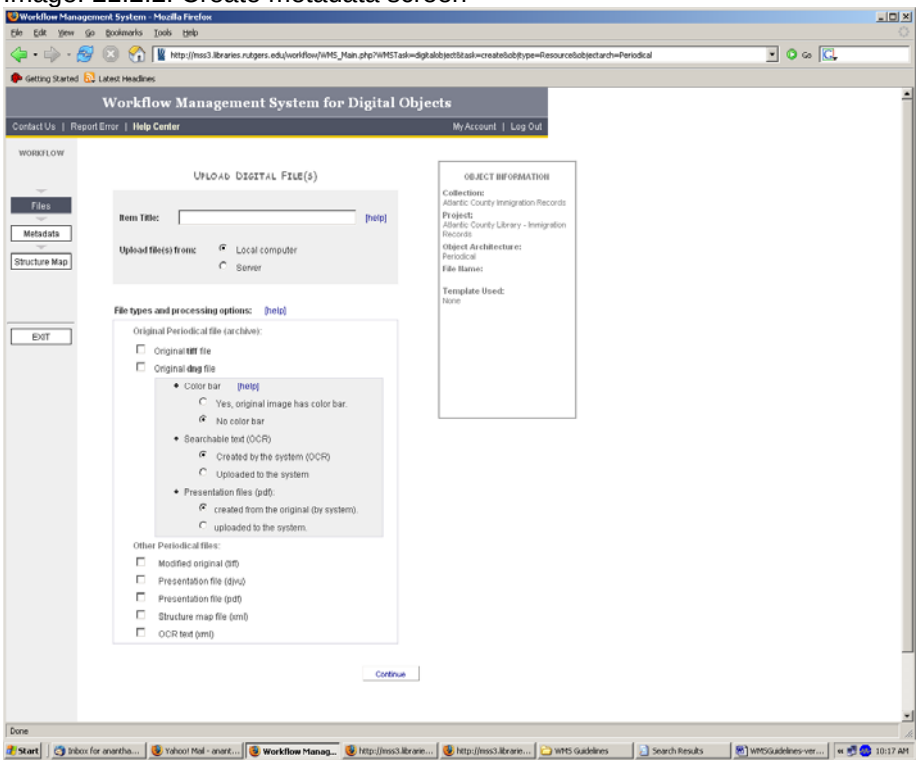
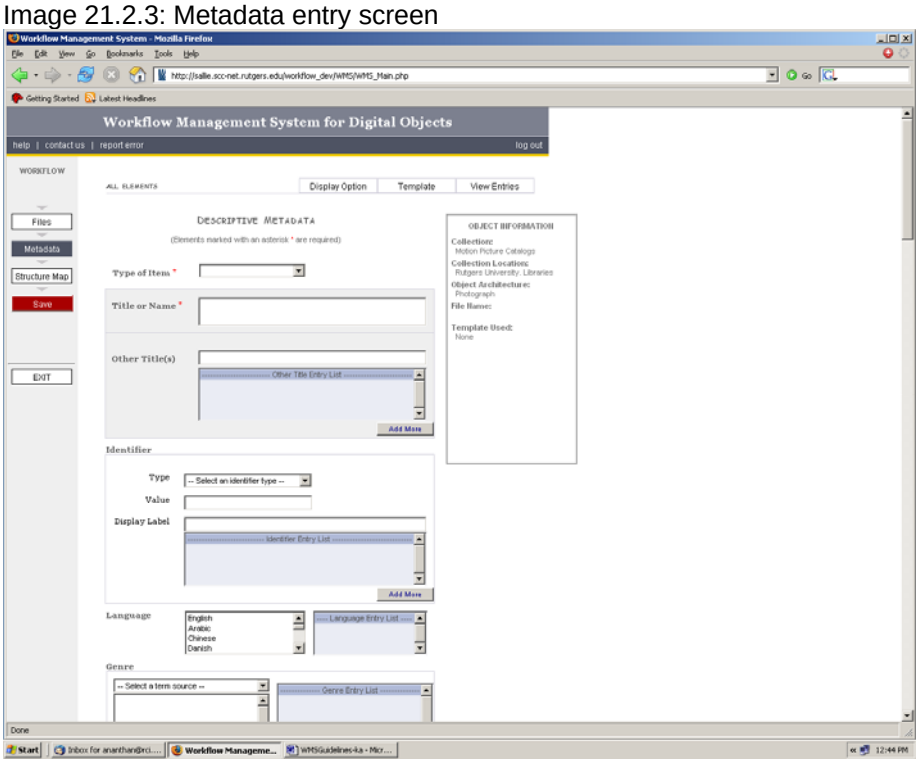


Image 21.2.3: Metadata entry screen



22.View a metadata record

- Select *Edit Object* (image 22.1)
- Select *Edit/View/Delete Object*
- Select the record
- Select *View*

Image 22.1: Edit/View/Delete metadata screen

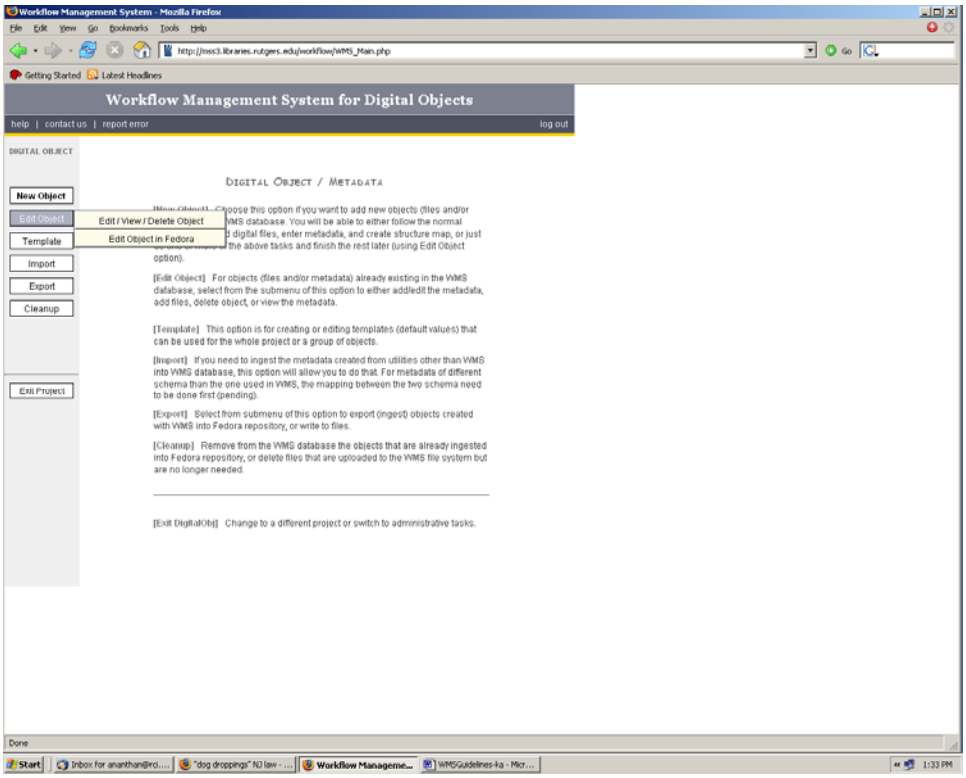


Image 22.2 View metadata screen

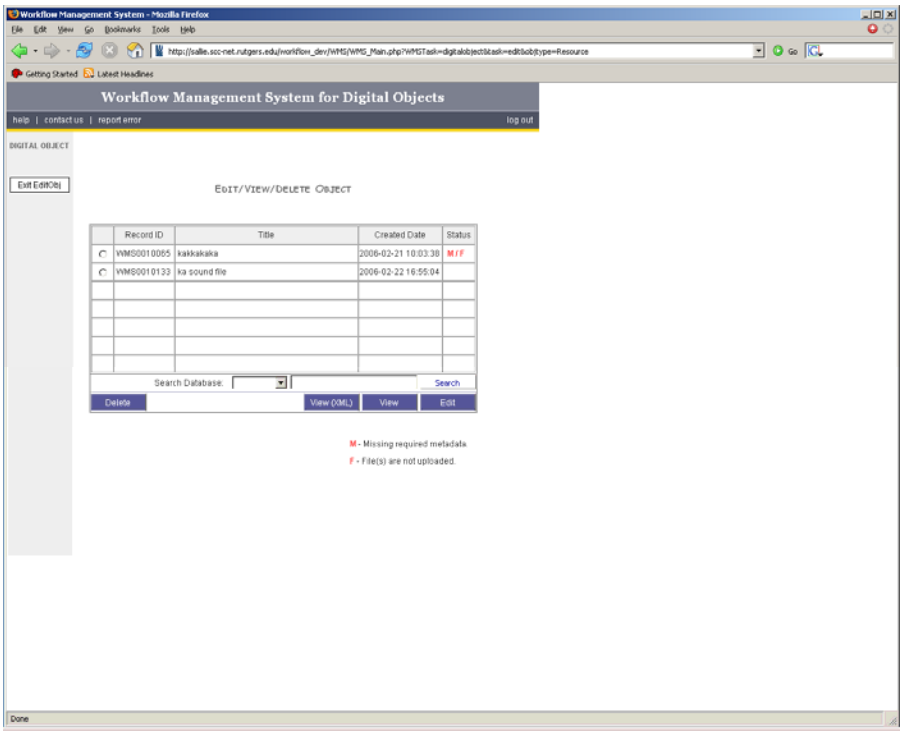
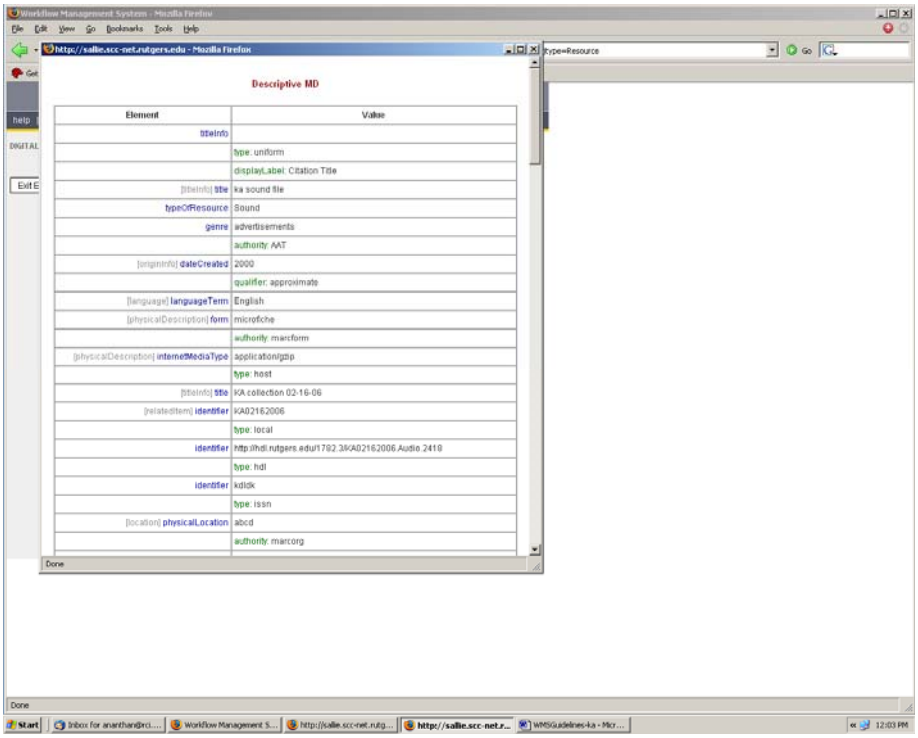


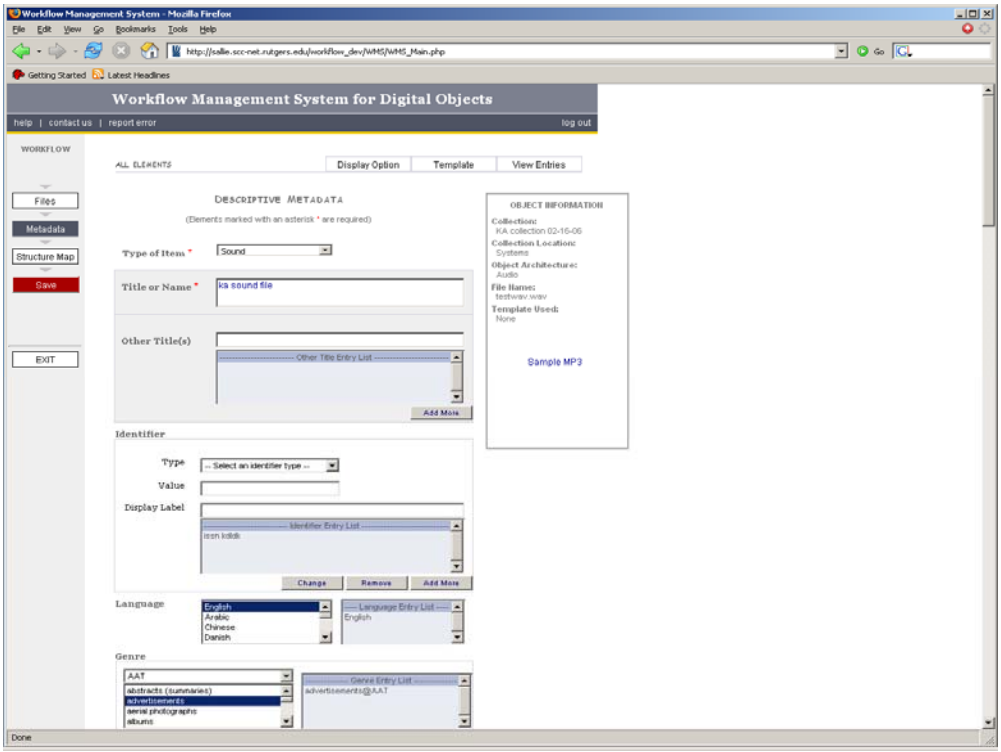
Image 22.3 View entry screen



23. Edit a metadata record

- Select *Edit Object* (Image 22.1)
- Select *Edit/View/Delete Object* (Image 22.2)
- Select the record
- Select *Edit*
- Edit the data value
- Select *Save* when you are done editing

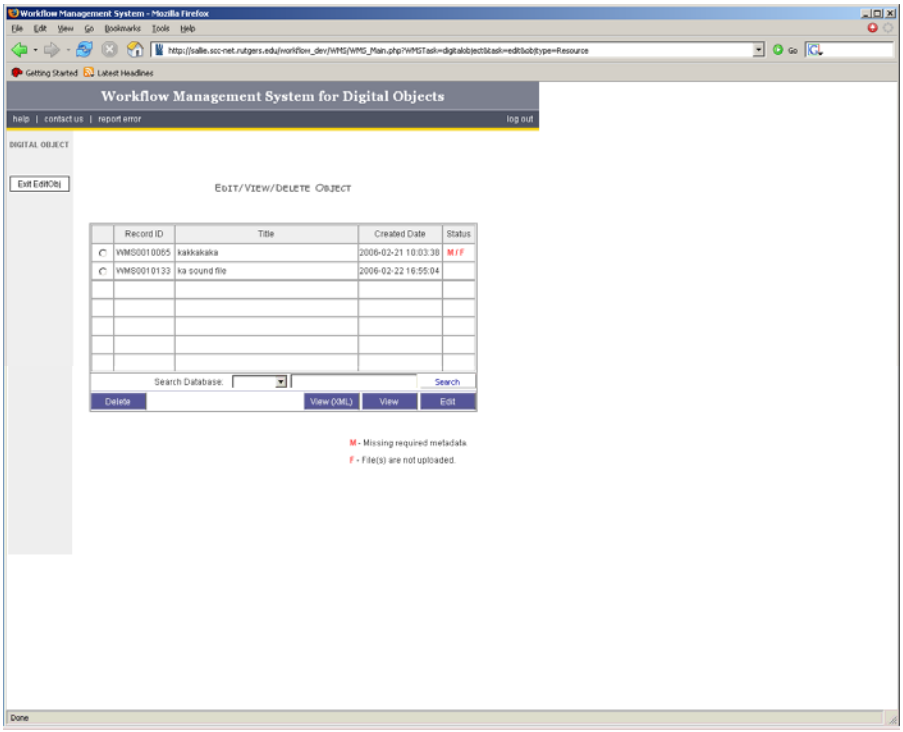
Image 23.1: Edit metadata screen



24. Delete a metadata record

- Select *Edit Object* (Image 22.1)
- Select *Edit/View/Delete Object* (Image 22.2)
- Select the record
- Select *Delete.* This option deletes the metadata record and the associated digital files permanently from the WMS server.

Image 24.1: Delete metadata screen

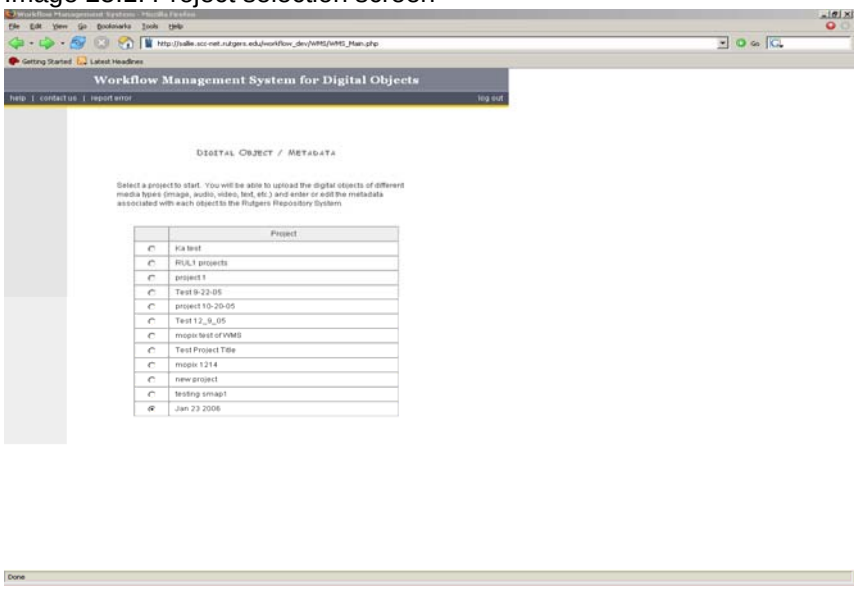


25. Create a template

Creating templates for your project will help expedite the metadata entry. You can create as many templates as you want for your project.

- Create and save a metadata record following the repository metadata guidelines. This record may be used to create a template.
- Select *Digital Object*
- Select *Project* from the project selection screen
- Select *Template*
- Select *New Template*
- Name the template
- Select *All Types*
- Select the record to use as the basis of the template. This will automatically save the template.

Image 25.1: Project selection screen



Tip 5: Templates

In some cases, all or many of the items in a collection will share some metadata. Genre, type, and some subjects might be identical. The template utility was designed to allow metadata creators to create generic records that contain default data. When a template is active, this default data is added to the metadata record automatically.

Image 25.2: Create template screen

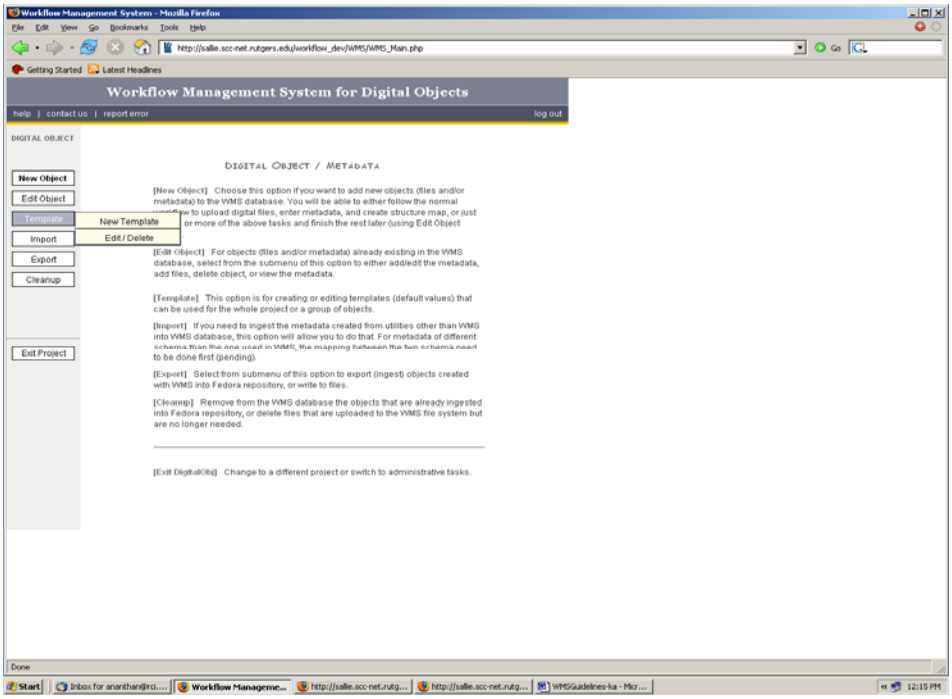
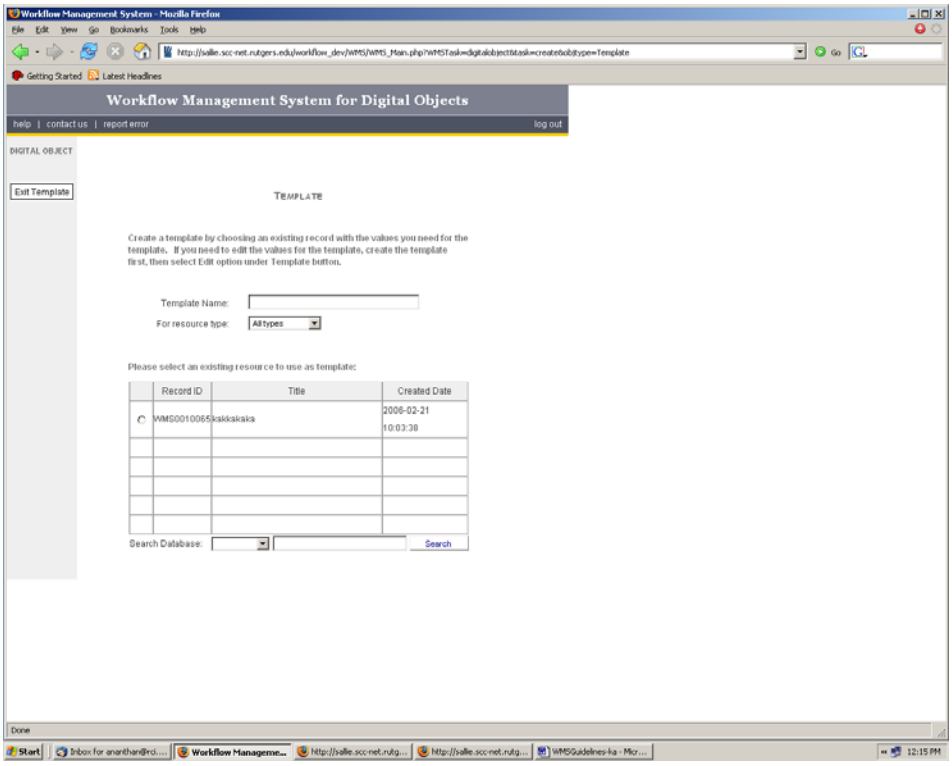


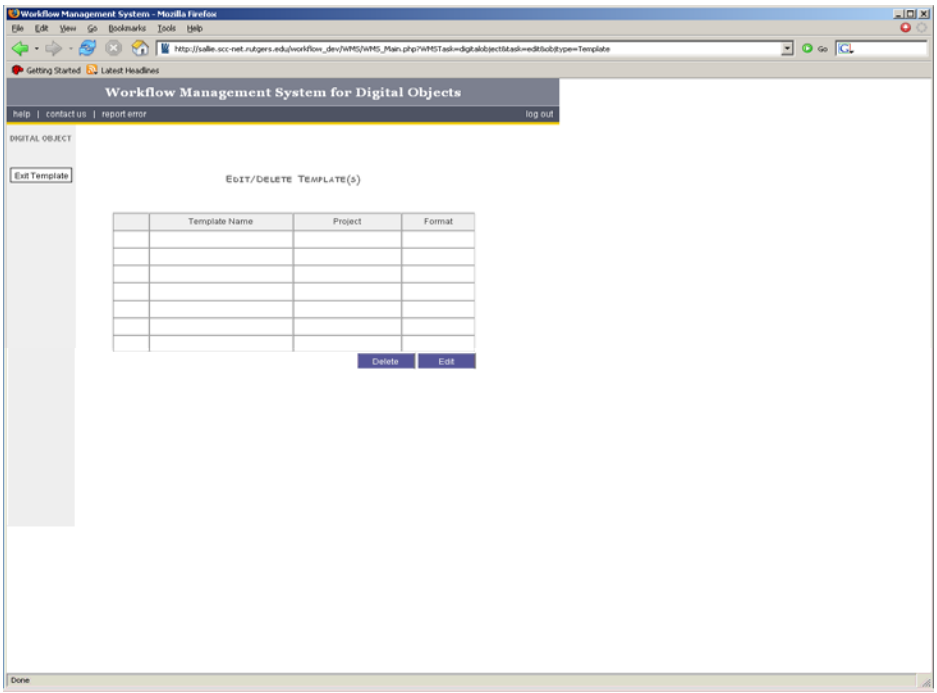
Image 25.3: Metadata record screen



26. Edit a template

- Select *Template* from the digital object screen
- Select *Edit/Delete*
- Select the template
- Select *Edit.* Add, delete or revise metadata in the template
- Select *Save* to save the template
- When you are done, Select *Exit Template*

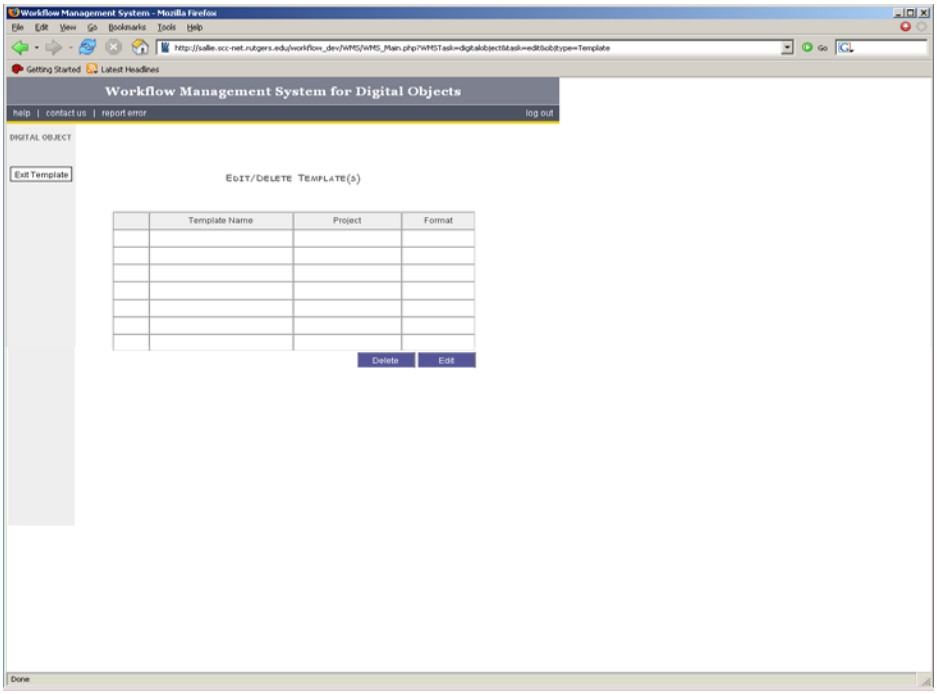
Image 26.1 Edit template screen



27. Delete a template

- Select *Template* from the digital object screen
- Select *Edit/Delete*
- Select the template
- Select *Delete*
- When you are done, Select *Exit Template*

Image 27.1: Delete template screen



28. Export a resource object

- Select *Export* from the Digital Object screen
- Select *To Fedora*
- Select *the metadata record*
- Select *Preview* to review the record in text format
- Select *Preview (xml)* to review the record in xml format. If you are using IE, you will see the metadata in xml format. If you are using Netscape or Firefox, you have to right click on the mouse and select view source to view the record in xml format
- Select *Sent to Repository.*
- The WMS will verify the successful export in a pop-up window. Once the record is exported successfully, it will NOT be listed in the Edit/View/Delete metadata screen.
- Click on the Rutgers-lib:xxxxx link and verify that the metadata and the presentation files are accessible in the repository system.

Image 28.1: Export screen

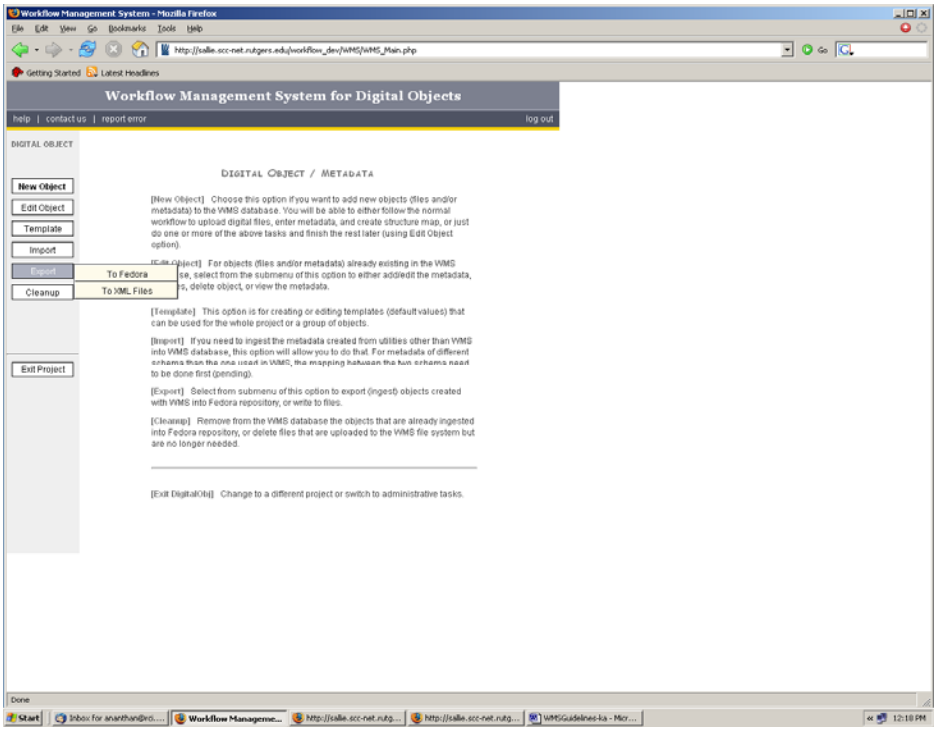


Image 28.2: Export screen

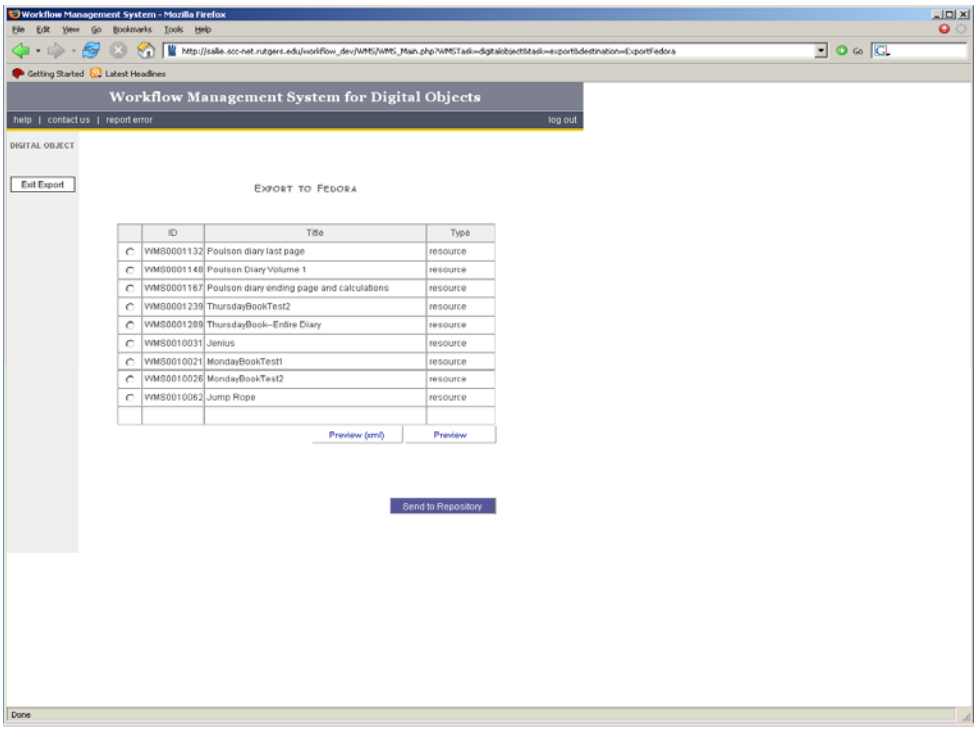


Image 28.3: Preview screen

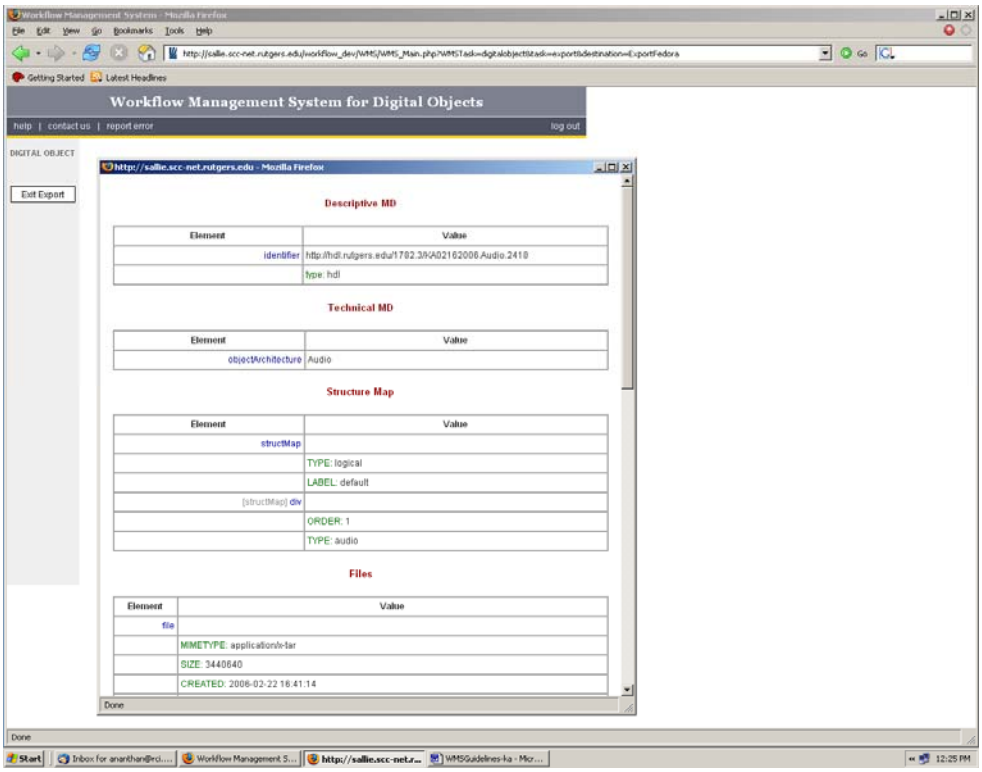


Image 28.5: Preview XML screen

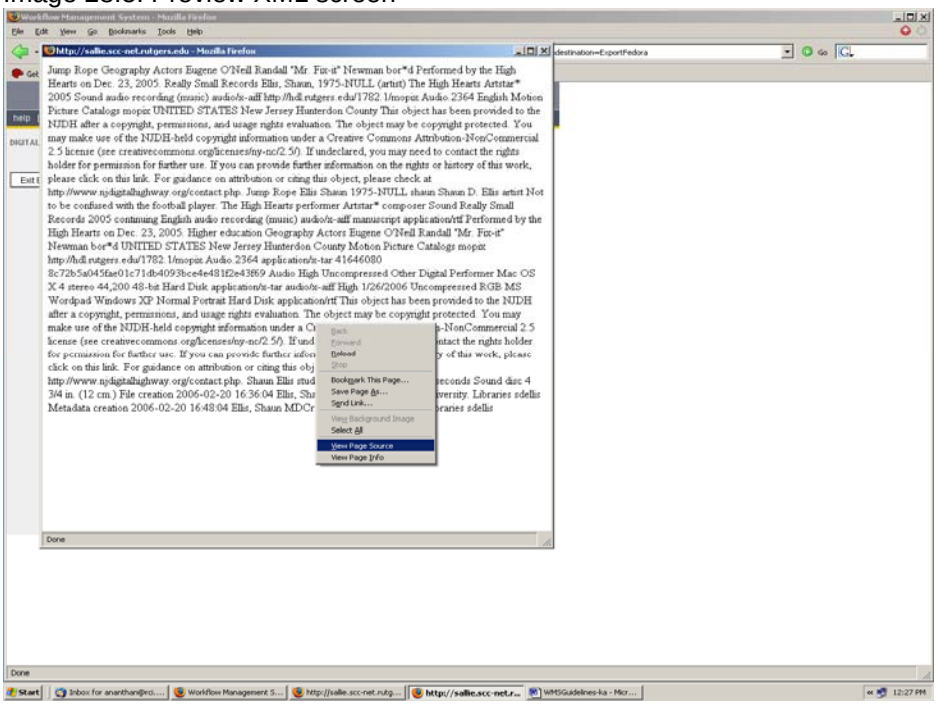
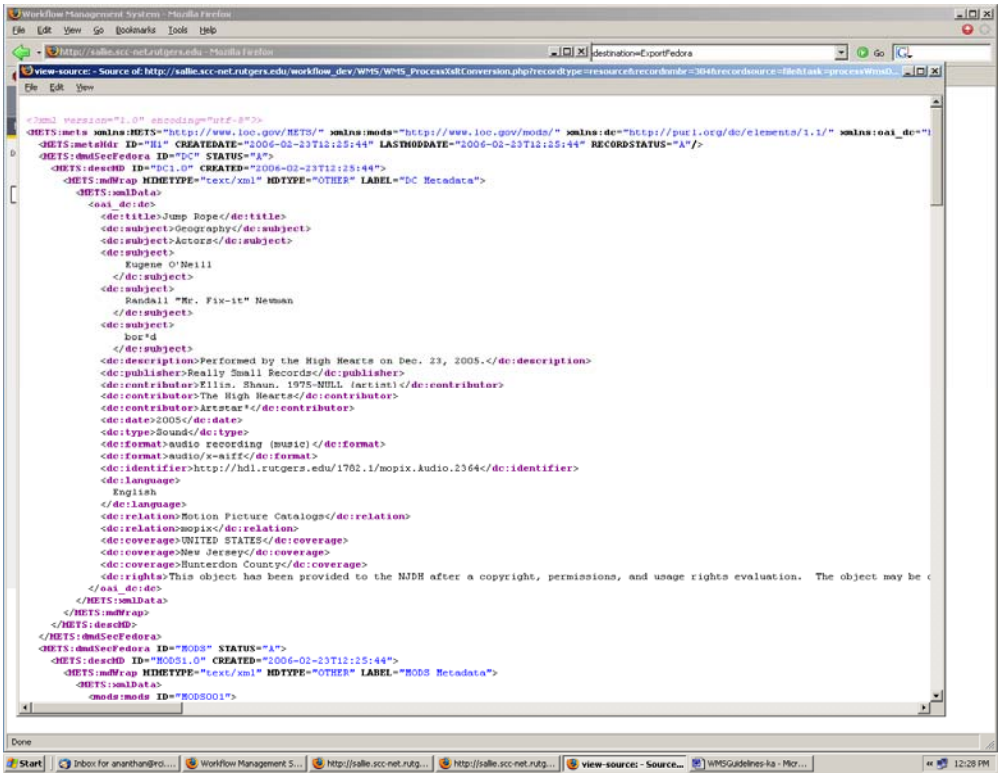


Image 28.6: XML screen



29. Edit an exported object

- Select *Fedora Edit* from the Digital Object screen
- Search WMS or Fedora by Title or ID
- Select *the metadata record*
- Edit metadata
- Click Save
- Indicate which Metadata Type has been changed
- Click *Done*

Image 29.1: Fedora Edit Screen

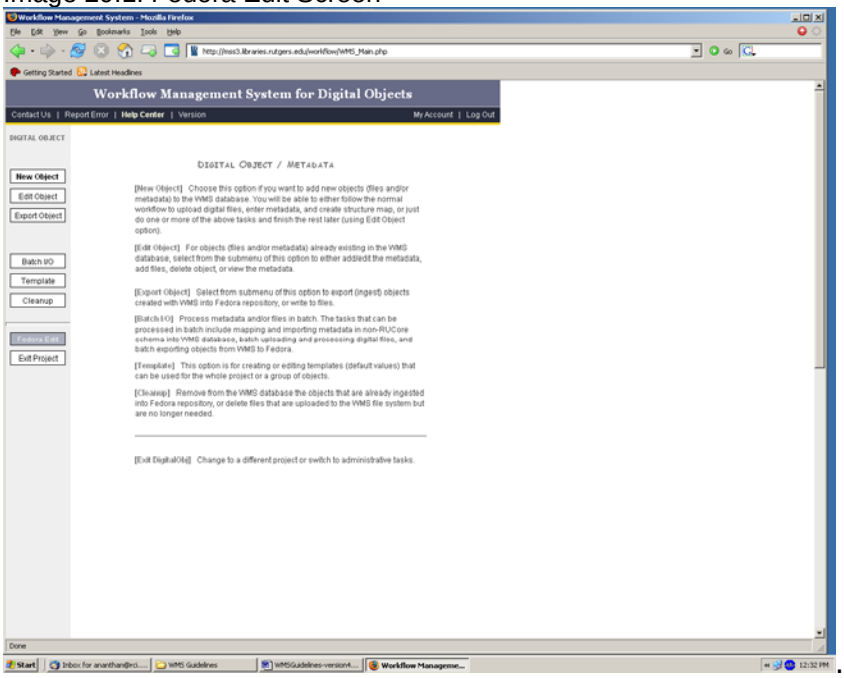


Image 29.2: Search WMS or Fedora Screen

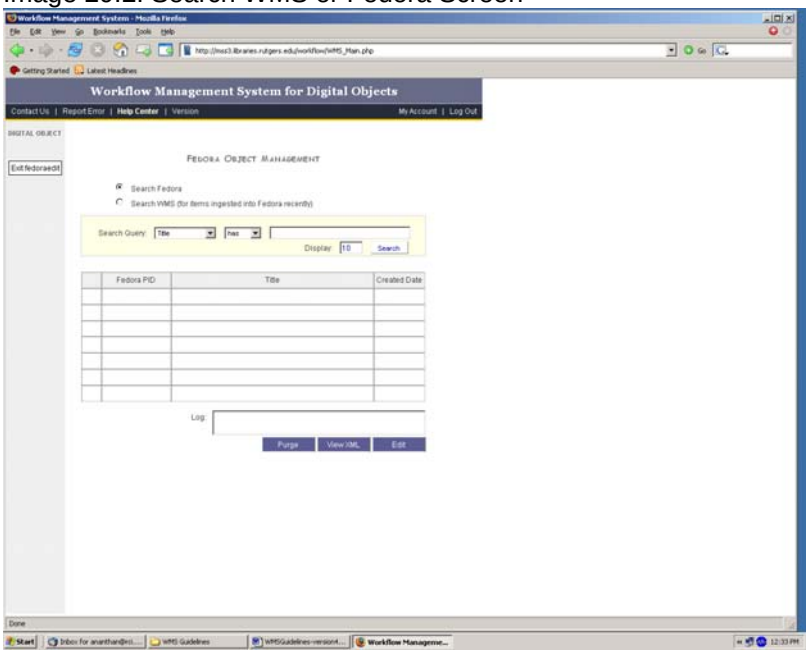


Image 29.3 : Select Object Screen

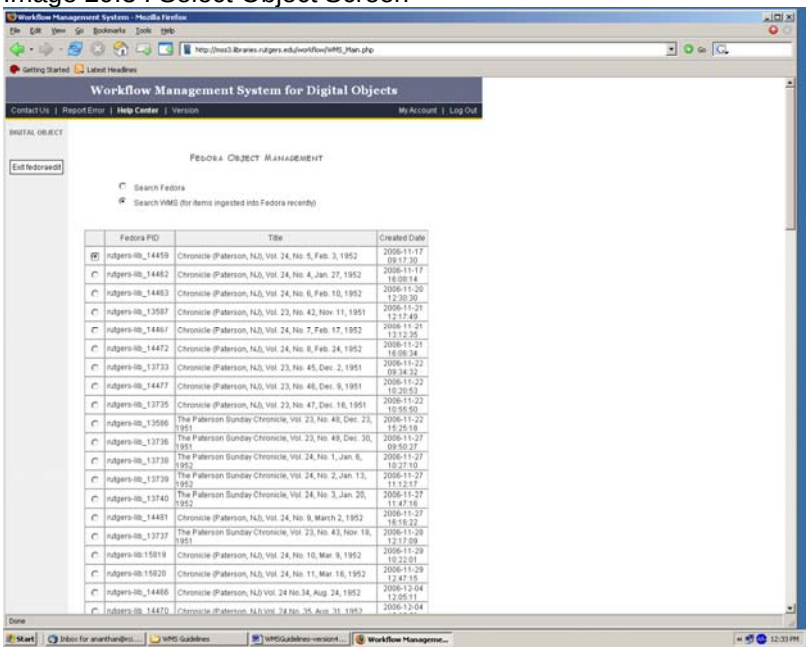


Image 29.4 : Metadata Screen

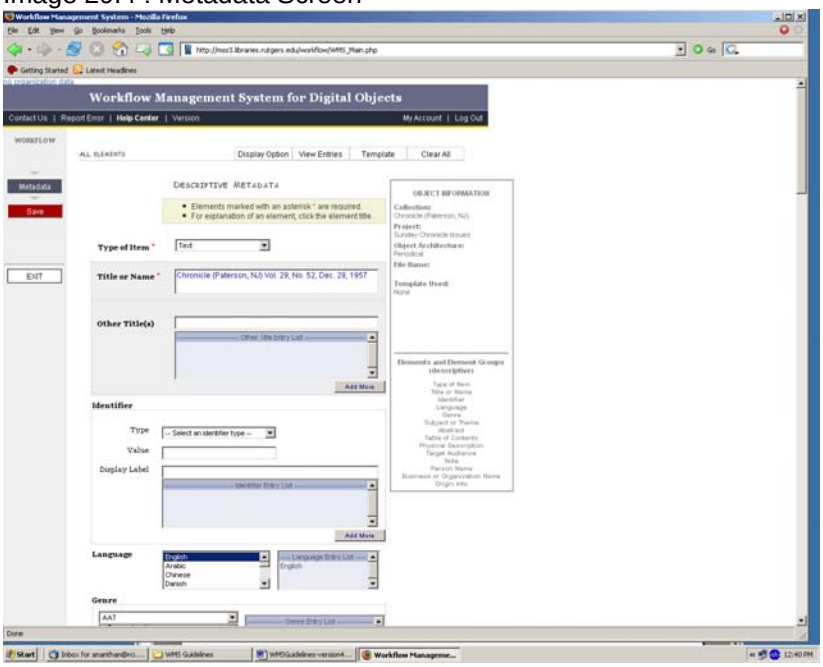
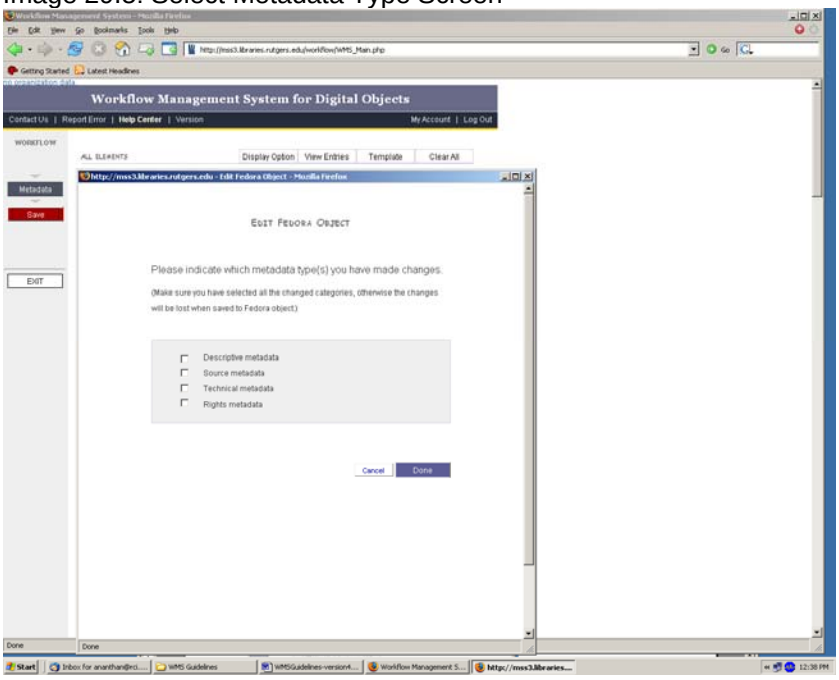


Image 29.5: Select Metadata Type Screen



30. Delete an exported object

- Select *Fedora Edit* from the Digital Object screen
- Search WMS or Fedora by Title or ID
- Select *the metadata record*
- Click *Purge*

Image 30.1: Fedora Edit screen

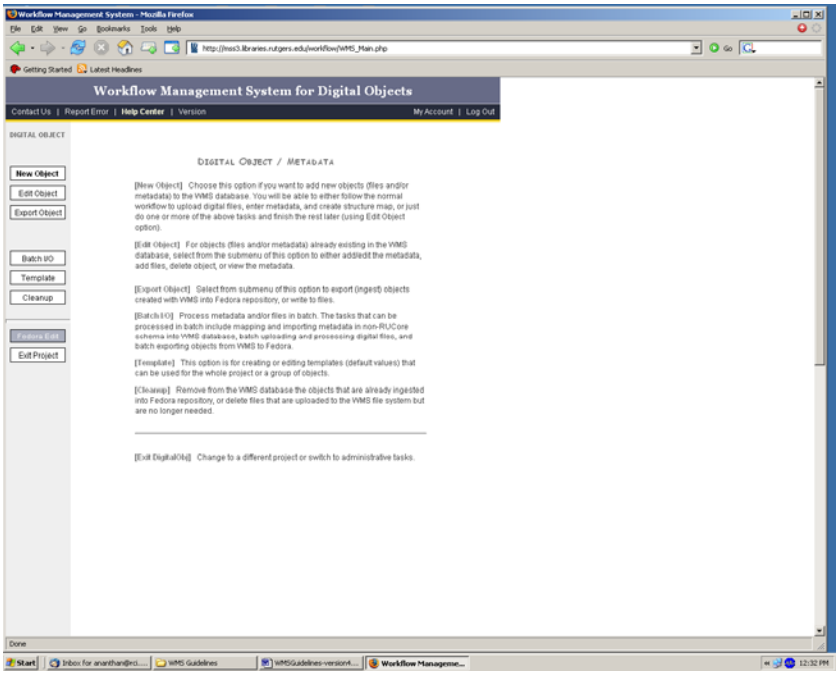
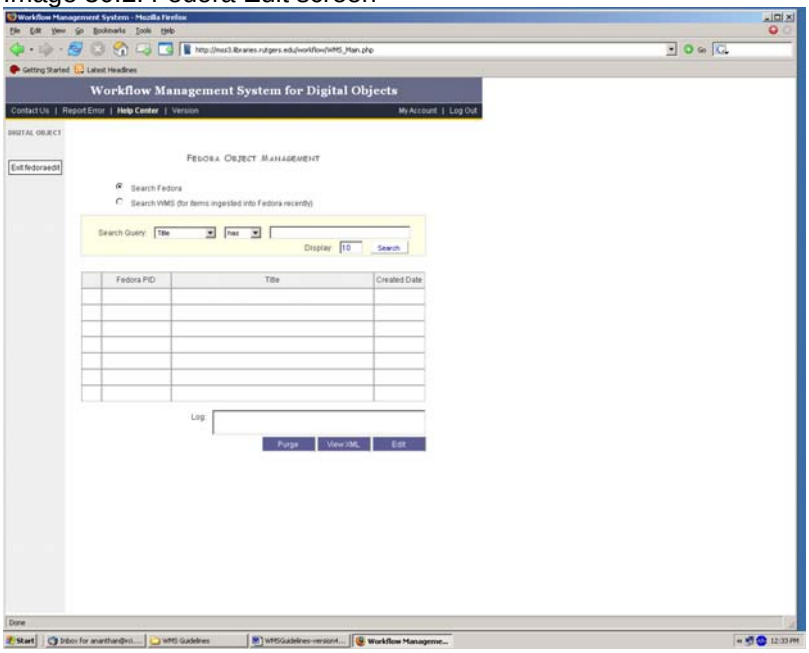


Image 30.2: Fedora Edit screen



31. Delete unused digital files

This option allows you to clean up the unused digital files that were uploaded to the WMS server.

- Select *Cleanup* from the Digital object screen
- Select *Unused Files*
- Select the record to delete

Image 32.1: Delete unused digital files screen

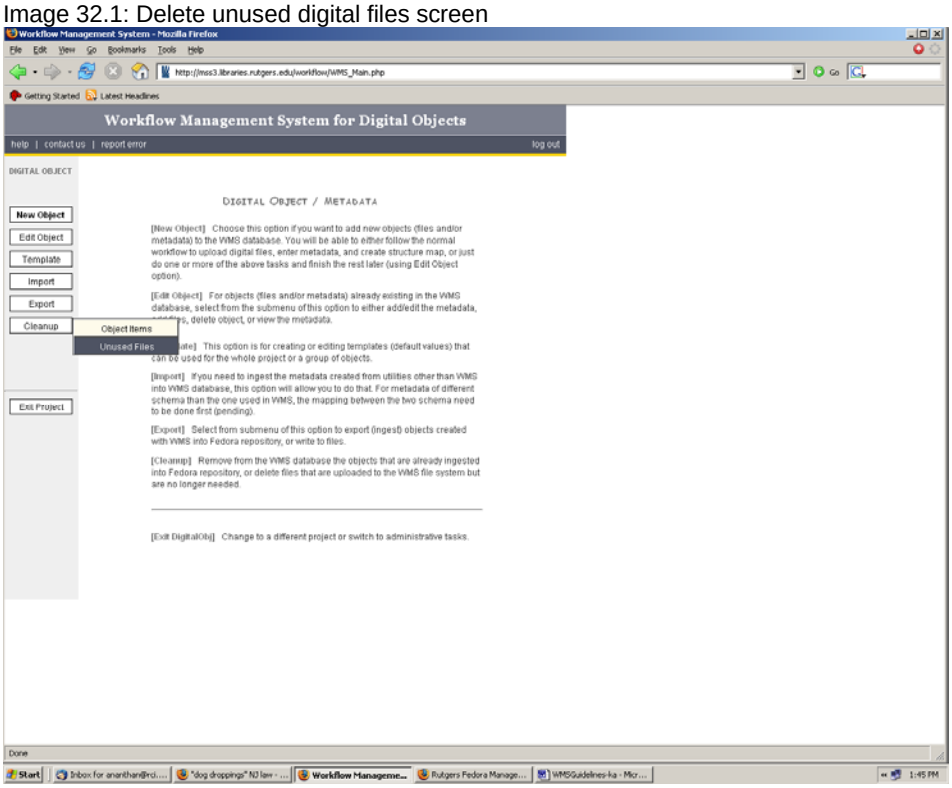
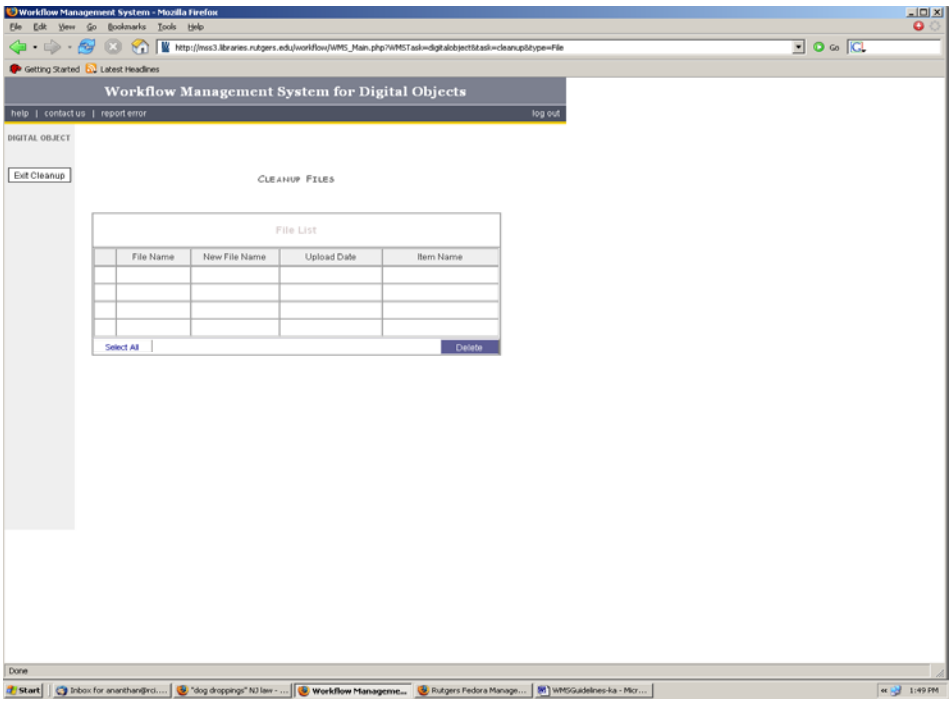


Image 32.2: Delete unused digital files



32. Log Off

- Select *Logout* to leave the WMS or to return to the WMS Log in screen.

Part IV: Batch Import/Export

Please DO NOT attempt to batch import metadata and digital files on your own. Consult with your metadata manager for assistance.

33. Import Metadata and Digital Files

Note:

a) If you are importing both metadata and associated digital files, the digital files need to be sent to RUCore server (via ftp or send in CDs) before doing step 4.
b) Depending on the number of records and file sizes, importing metadata and digital files to WMS may take up to several hours or even days.
c) After the process is started, you can leave this page. Come back to this page to check the status of the import.
d) Test a small batch load before importing the entire batch.
e) The metadata should be exported into TAB delimited .txt file. Remove the row with column headings in the .txt file.
f) The .txt file MUST have the associated digital files (master) for each metadata record, and it MUST also have a main title.
g) If you are uploading presentation files, you MUST have a field column for each type.
h) Multiple values for an element must be delimited.
i) Multiple values from different source must have a separate column for each source in the .txt file.

- Select *Batch I/O* from the Digital Object/Metadata Screen
- Select Import Metadata & Digital files (Image 33.1.1.)

There are four steps to accomplish this. You MUST follow the steps in the order listed on the screen.

Step1: Map the metadata fields from the in-house database to WMS database.

- Select *Map the proprietary metadata schema to RUCore schema*
- Select *In-house database or spreadsheet*
- You will be presented with a screen similar to Image 33.1.4. Enter a *batch ID*
- Select the *object architecture*
- Enter the *field name* from your .txt file in the same order. To insert a field, click on "<<". To delete a field, click on "x".
- Enter *Delimiter* used in the text file. e.g. TAB or SPACE
- Click *Submit Fields.*
- You will be presented with a screen similar to Image 33.1.5. You need to map the fields from your text file to the fields in WMS. Select the WMS field name on the left side of the window and Select the field on the right side of the window. The selected fields will be displayed in the gray box below. Click on the radio button to remove a field.

- If you have multiple values in a column, enter the value separator such as "#".
- When you are done mapping, select *Save.*
- You can edit the mapping any time you want before starting the import.

Step 2: Send in the Metadata File (in txt format)

If you have the metadata in a database, export it into .txt file or spreadsheet first and then to a .txt file. Remove the row with field headings.

- Select the *Batch Name*
- Select the metadata file in text format
- Select *Upload*

Step 3: Review Metadata and Mapping Results

Although this is an optional step, it is highly recommended to make sure that you have mapped the fields correctly.

- Select *record 1*
- Select *View Original* to view the first metadata record from the text file you have uploaded in step 2.
- Select *View RUCore* to view the first metadata record in xml
- Repeat the above three steps to review a few more records in the text file.
- Select *Cancel,* if you are satisfied with the mapping.

Step 4: Import metadata and digital files to WMS

The last step before starting the import is to select the digital files to match and load the digital files to the metadata record. The process takes long time depending on the number of records in the batch. Please allow some time for the system to process the batch.

- Select the *batch name*
- Select the *File Location*
- Select Options for presentation files
- Select *No* If you are uploading the presentation files
- Select *No* if the originals do not have color bar
- Select *Yes* if you want the users to search the text on the image files
- Select *Yes* if you want the objects ingested directly into Fedora.
- Select *Start Import.*

View Import Status

The import process runs in the background. You can monitor the progress by selecting *View Import Status* from the Batch Import screen (Image 33.1.2).

- Select *batch name*
- *Total number of items* column shows how many objects are being imported
- *Processed* column shows how many objects were imported
- *Completed* column shows you the number of objects imported
- Click on the number listed under *Completed* for details of the object
- *Failed* column shows you the number of objects failed to import
- Click on the number listed under *Failed* for details of the objects failed to import
- Select *Refresh* to refresh the status screen
- Select *Cancel* to return to the main batch import screen.

Image 33.1.1: Batch Import selection screen

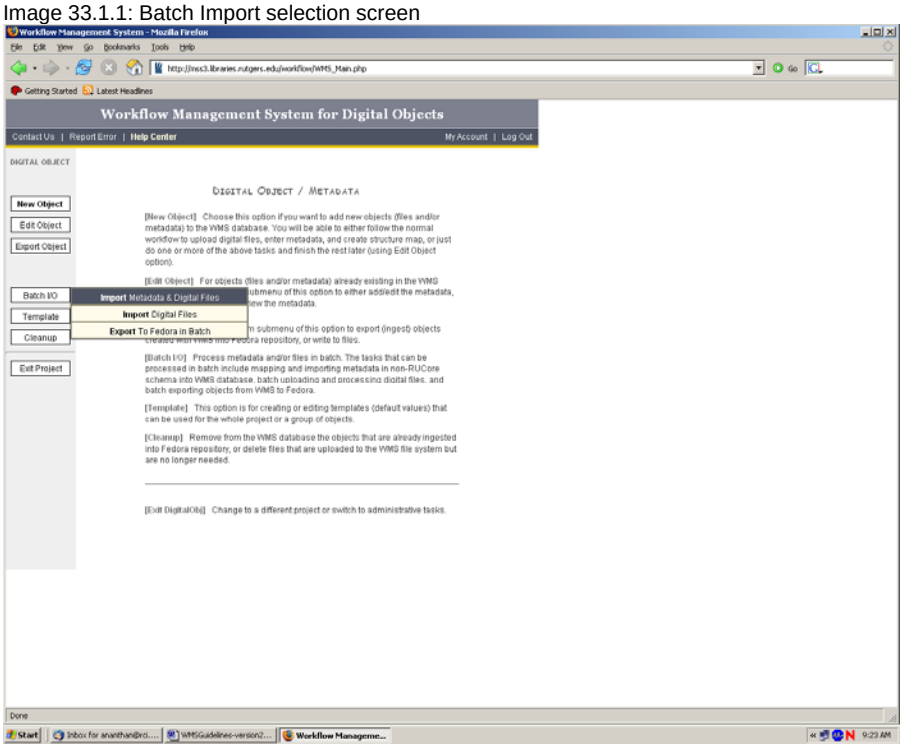


Image 33.1.2:Batch Import screen

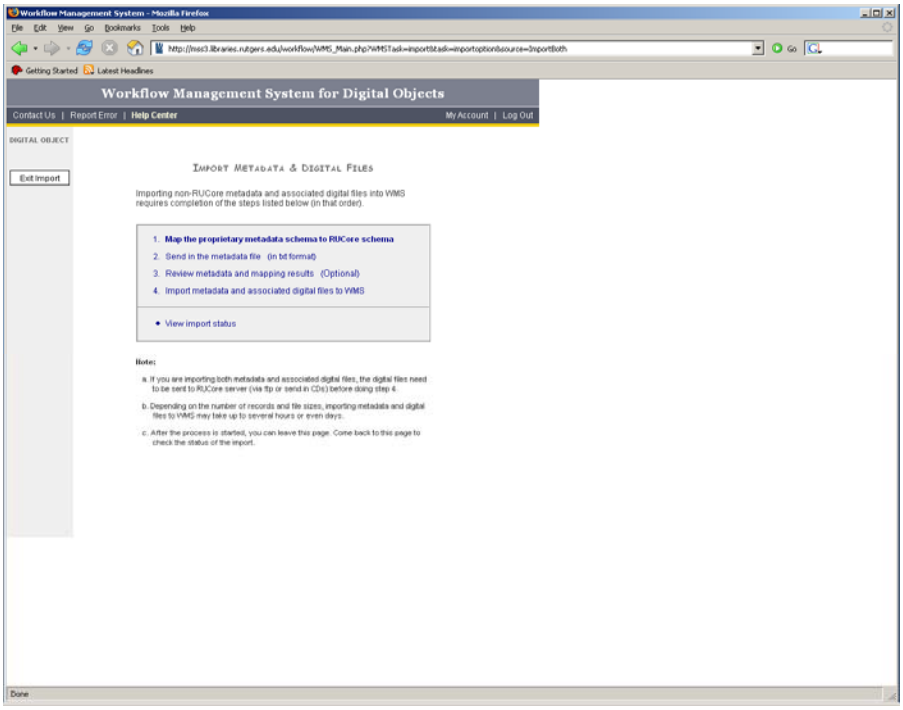


Image 33.1.3:Batch Import Step 1. screen 1

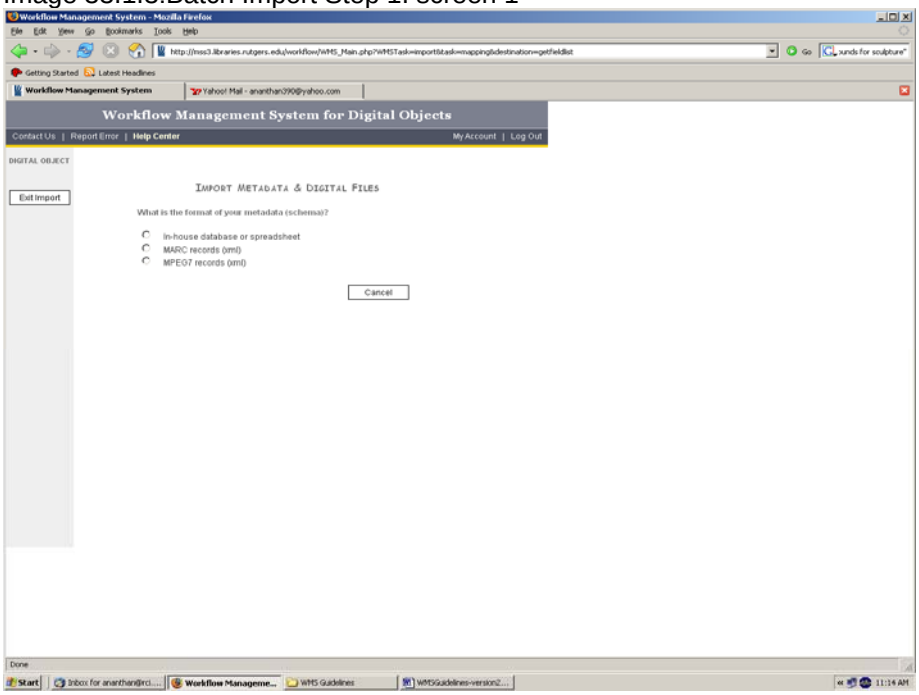


Image 33.1.4:Batch Import Step 1. screen 2

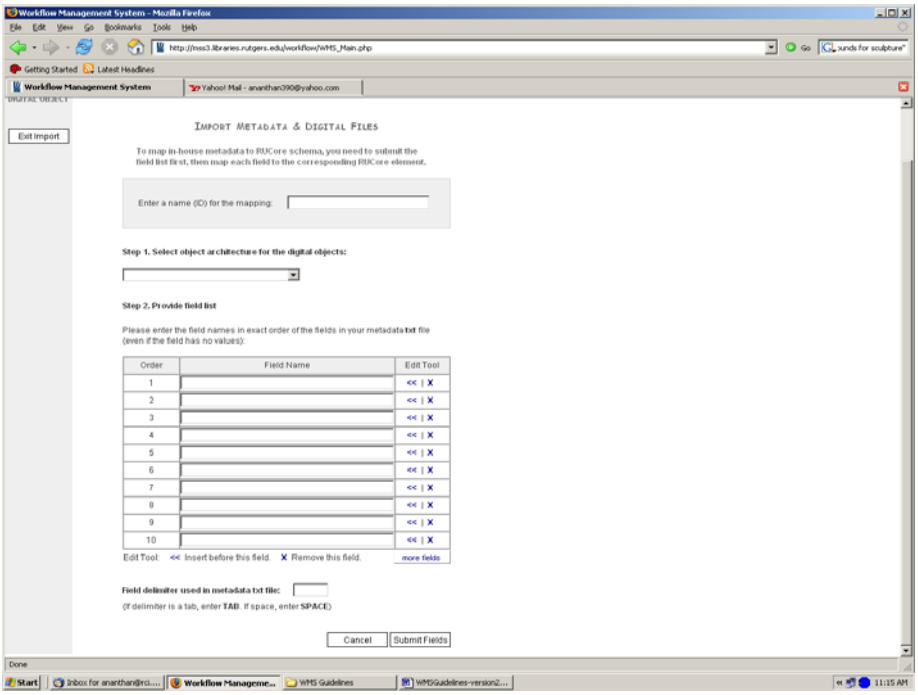


Image 33.1.5: Batch Import - Step 1. screen 3, Map to Rucore

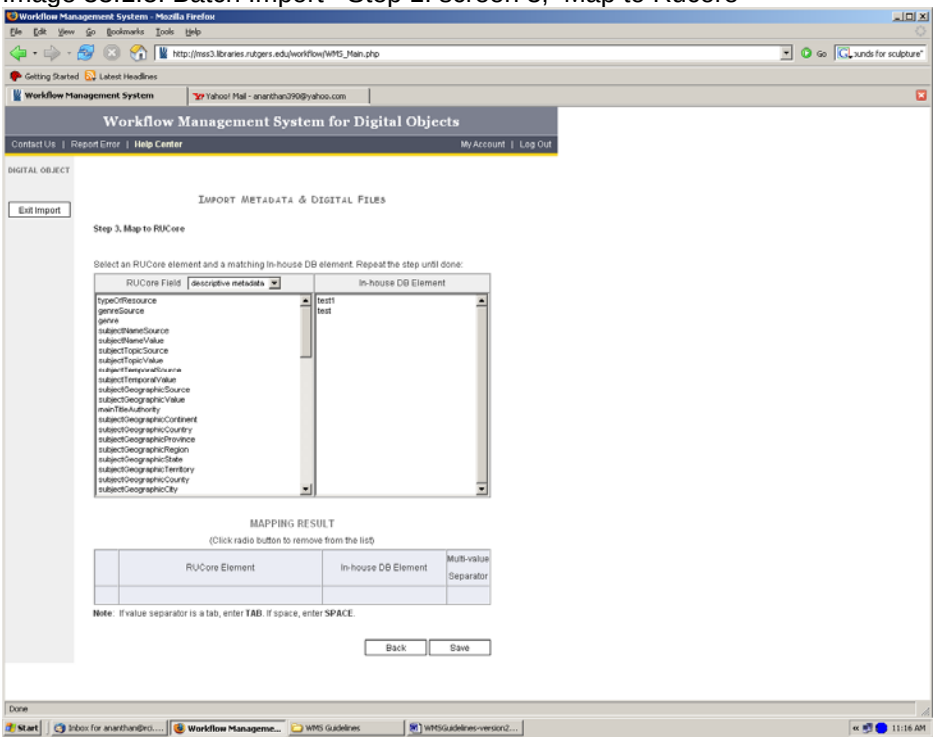


Image 33.1.6: Batch Import – Step 2

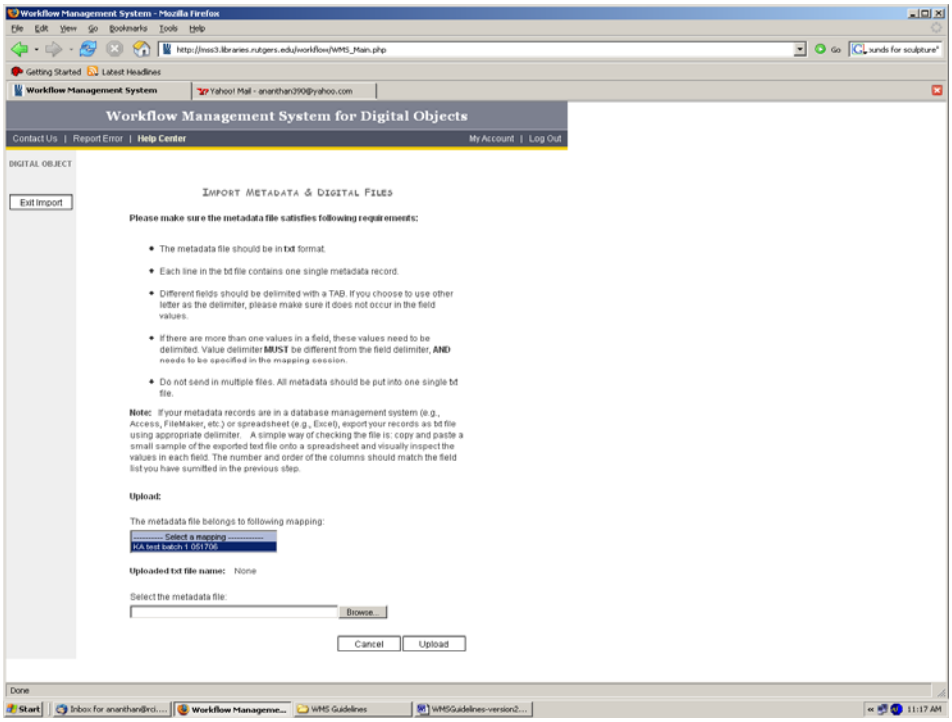


Image 33.1.7: Batch Import – Step 3

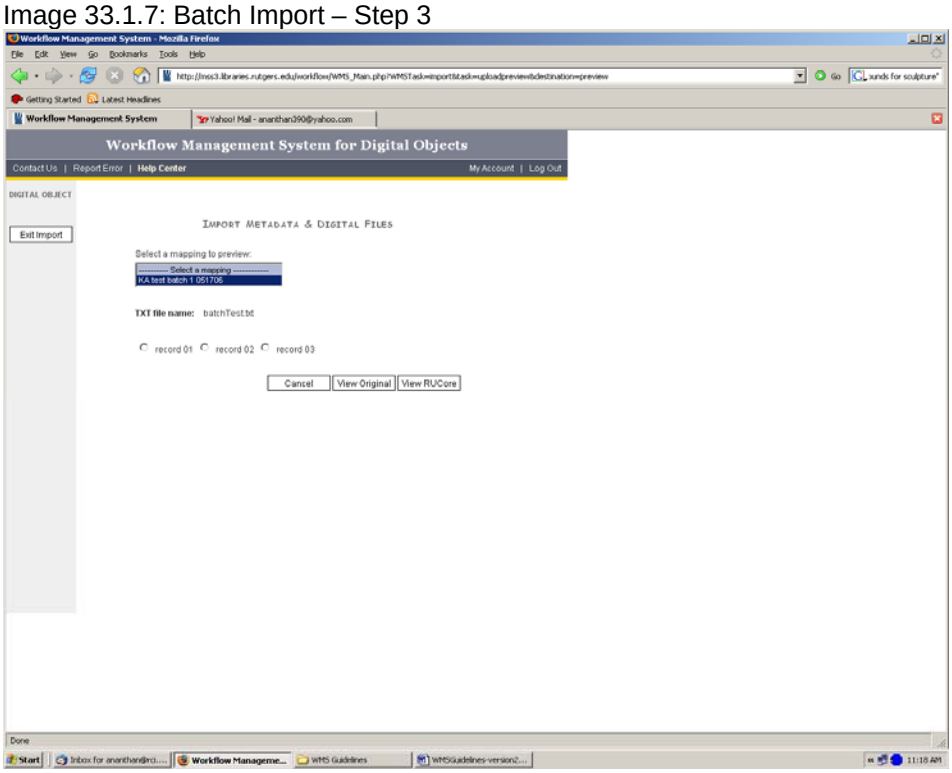


Image 33.1.8: Batch Import – Step 4

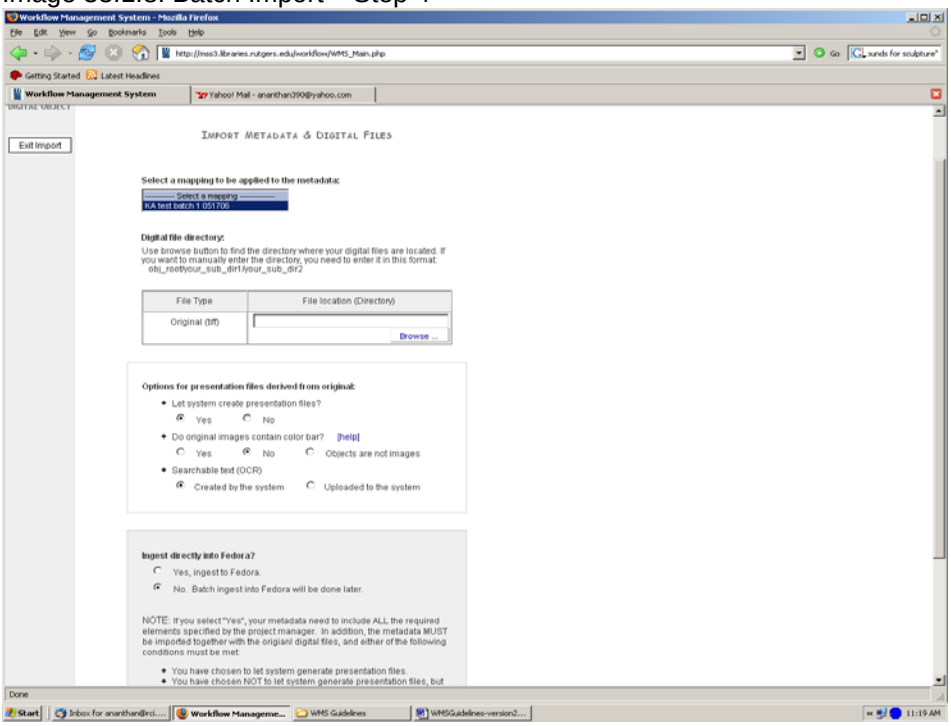


Image 33.1.9: Batch Import – Status Screen

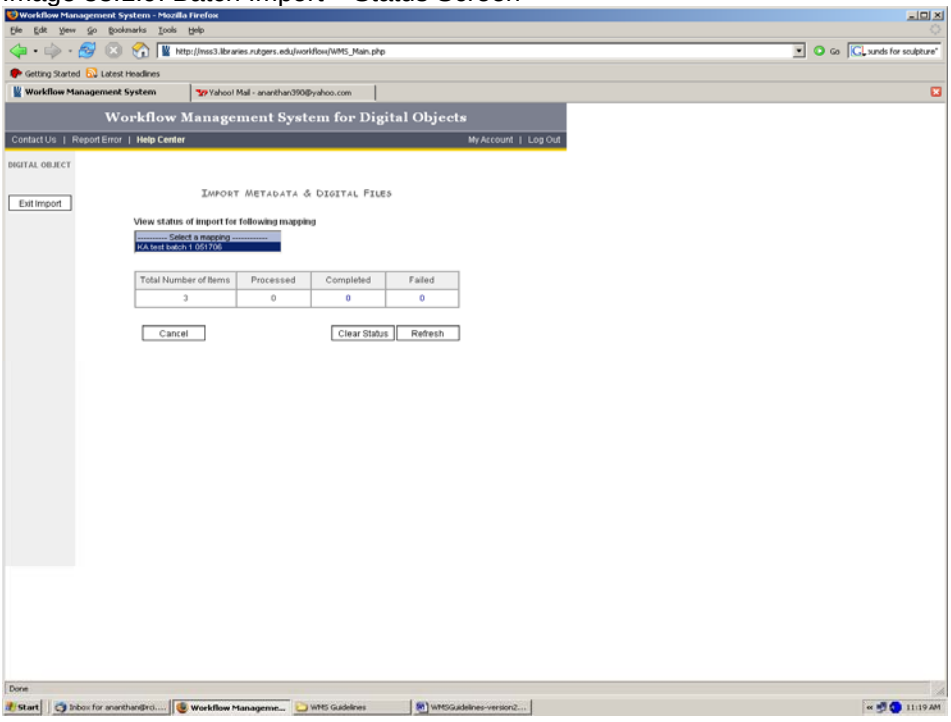
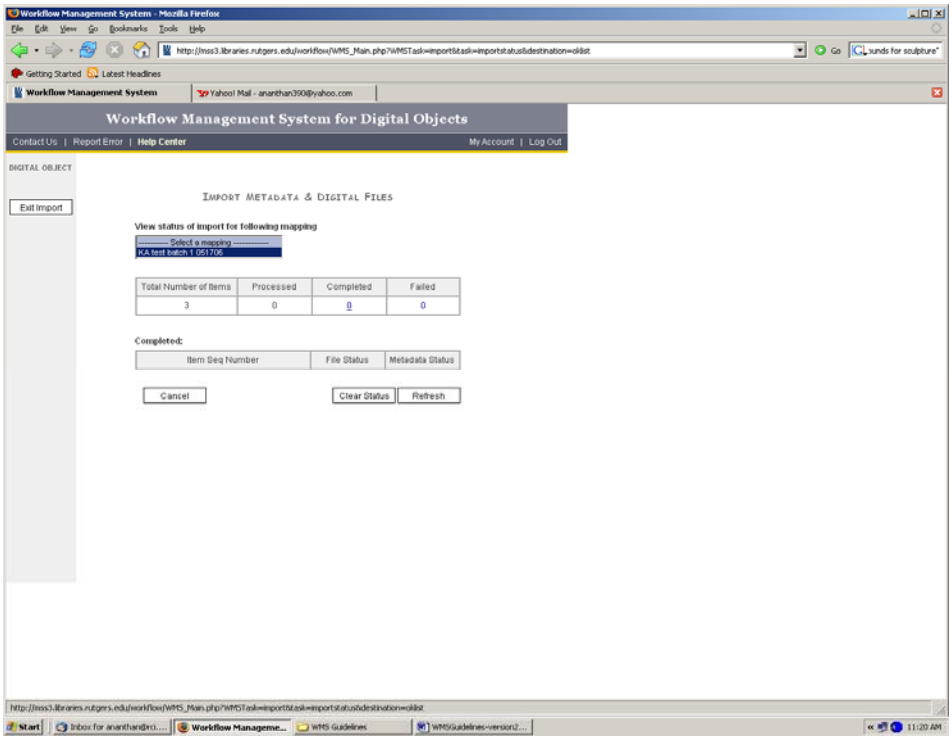


Image 33.1.10: Batch Import – View Status Screen



34. Import Digital Files Only

In order to import digital files into the WMS, the digital files must reside on the RUCore server. Check with your project manager for the name of the directory and the file upload. **Please consult with your project manager and metadata manager before batch importing digital files.** This process may take several hours or days, therefore, do not attempt to import a batch of more than 100 files at a time.

- Select *Batch I/O* from the Digital Object/Metadata Screen
- Select Import Digital files Only (Image 34.1.1.)
- Select *Import digital files to WMS*
- Enter a *file import job name*
- Enter *Object Architecture*
- Select the file types you are importing and click on *Set Files*
- Select *Provide a list of file names or s*elect *Specify a range of files* if you are uploading a multi page object. If you choose the second option you only have to set the first file name and the last file name of the object.
- Browse the directory tree, select the directory where your files reside and highlight the files you want to upload
- Select *No* if you are uploading the presentation files
- Select *No* if the original image contain color bar

- Select *Yes* if you want the text in the image searchable by users
- Select *Start Import.* This will take time so please be patient.

Image 34.1.1. Batch Import Digital Files

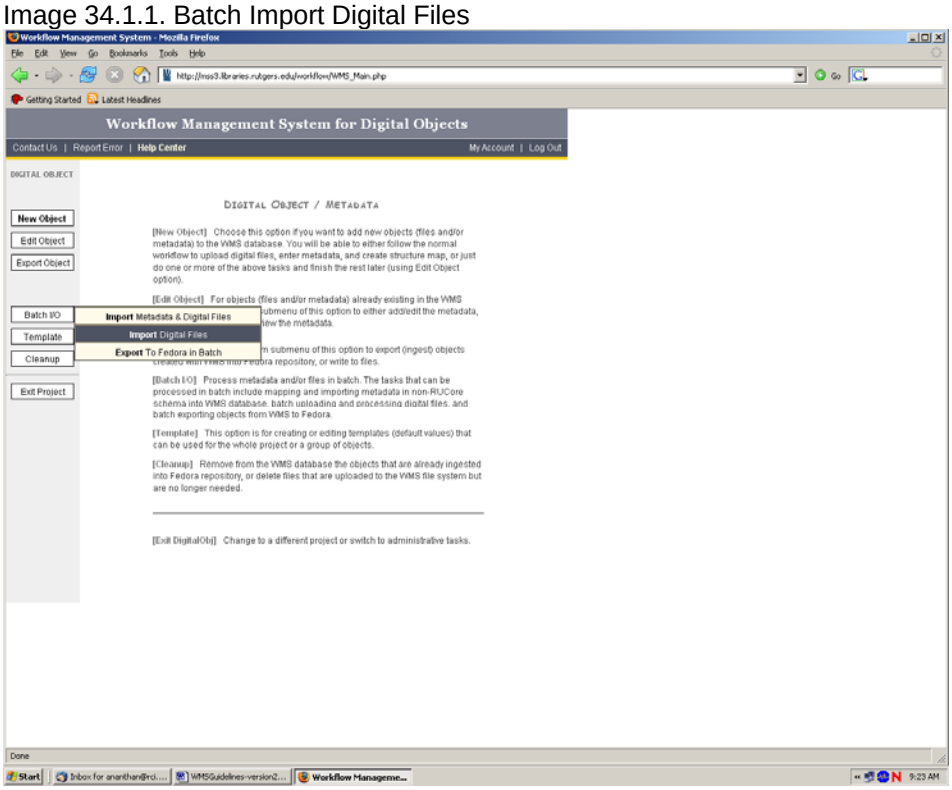


Image 34.1.2. Import Digital Files only screen 1

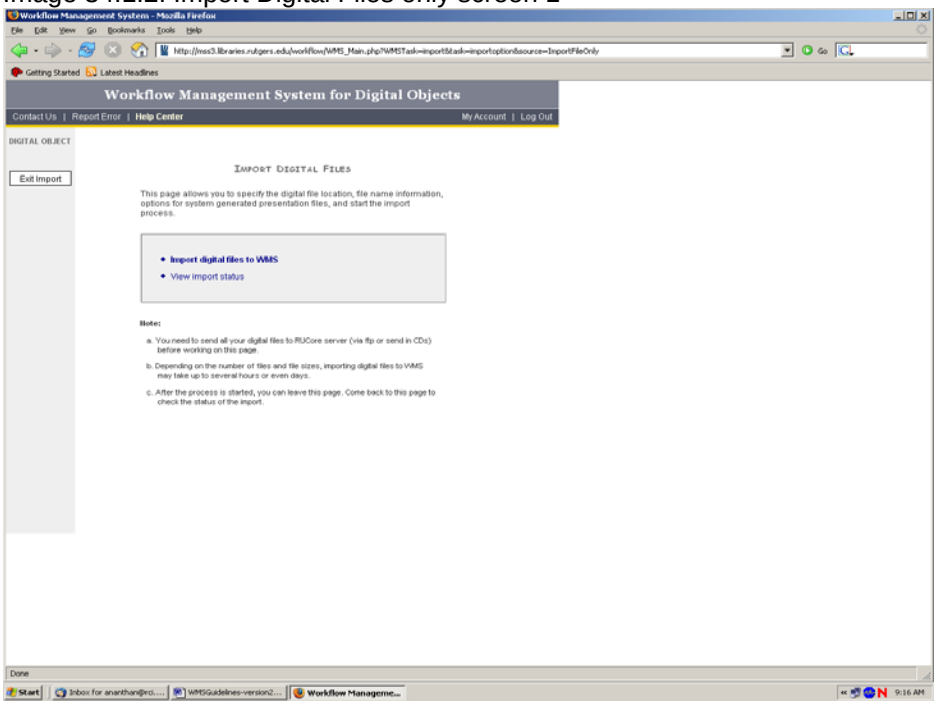


Image 34.1.3 Import Digital Files Only screen 2

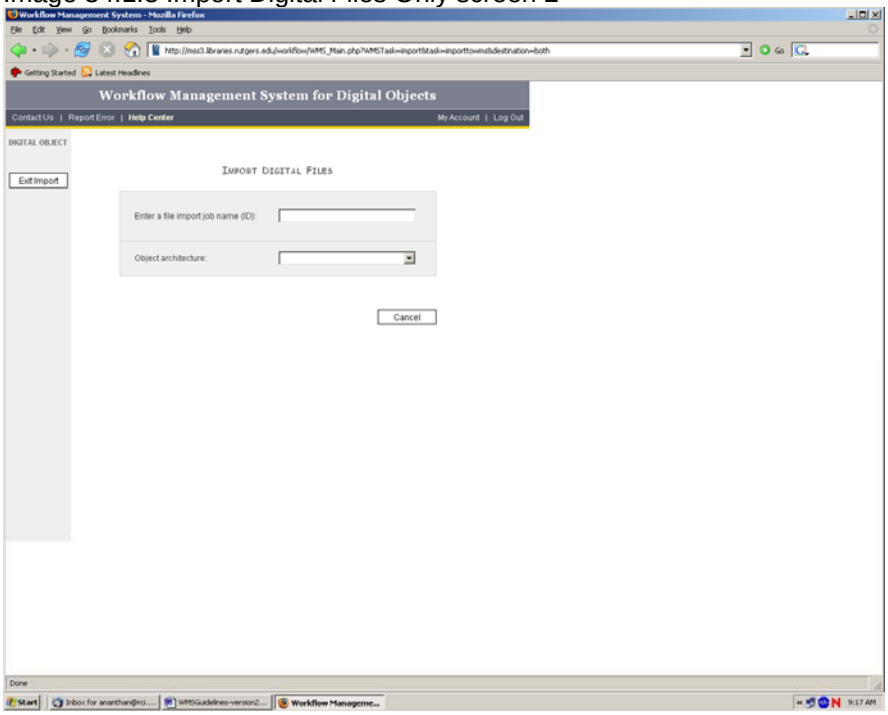


Image 34.1.4 Import Digital Files Only screen 3

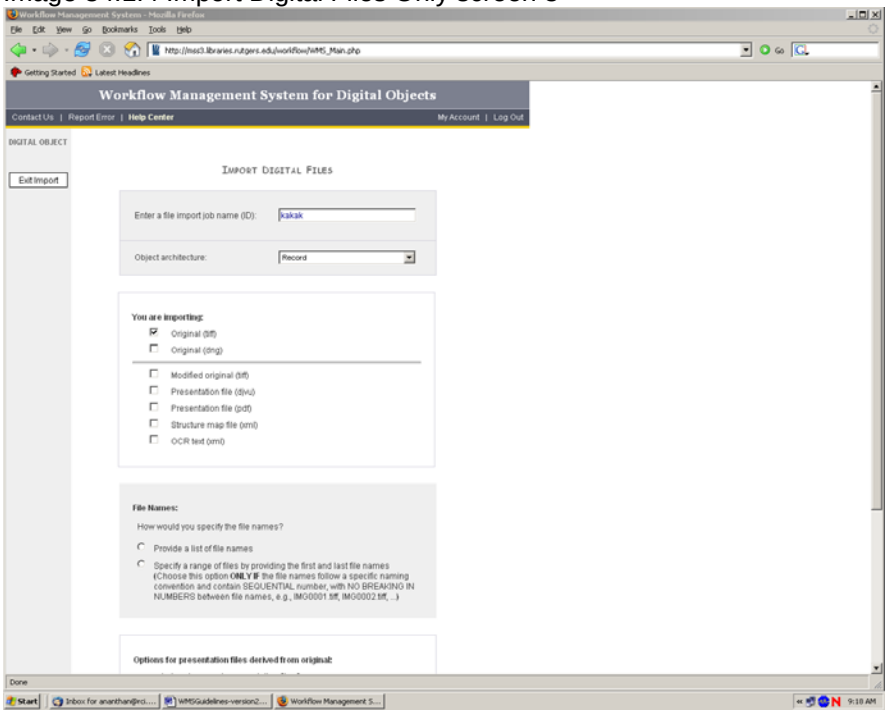


Image 34.1.5. Import Digital Files Only screen 4

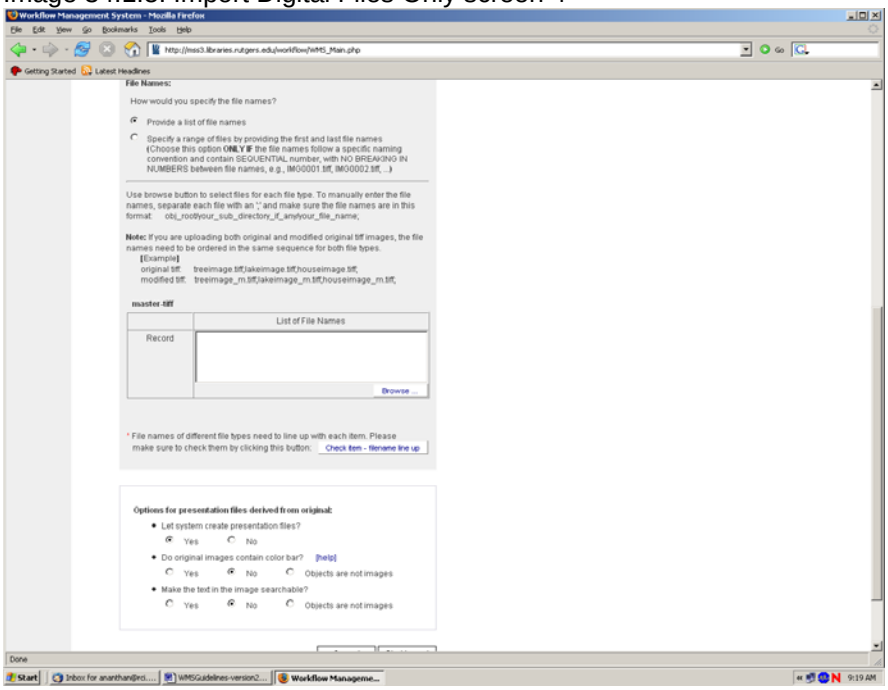
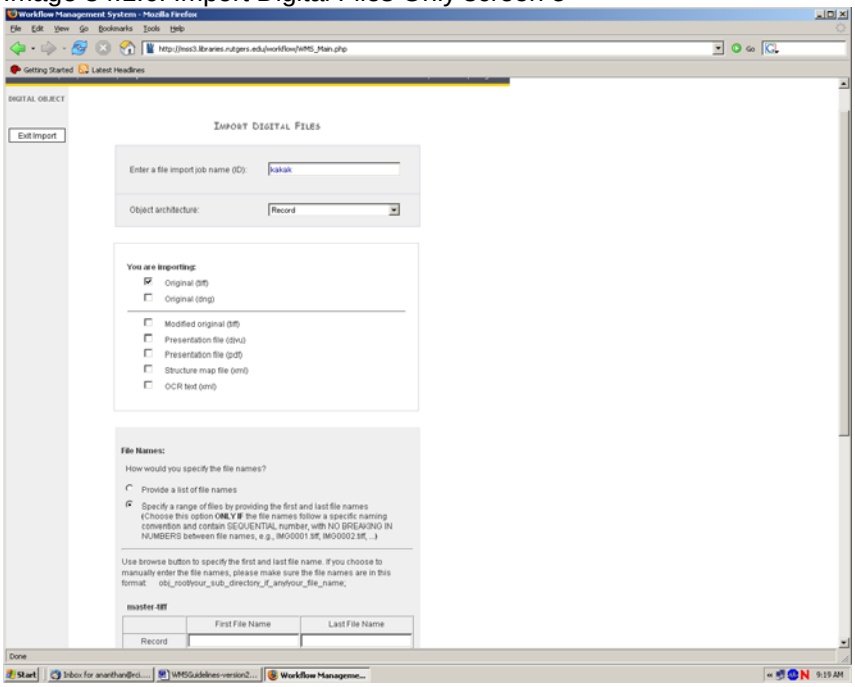


Image 34.1.6. Import Digital Files Only screen 5



35. Batch Export

This option allows users to export objects into fedora in a batch.

- Select *Batch I/O* from the Digital Object/Metadata Screen
- Select *Export to Fedora in Batch*
- Select the objects to export. Hold down ctrl key to select multiple objects
- Select *Export.* This will take some time so please be patient. DO NOT to export the batch again as this will duplicate the objects in Fedora.
- Select *Refresh* to monitor the progress of export. *Total Number of Items* column shows how many objects were selected for export; *Pending* column shows how many objects are to be exported; *Ingested* column shows how many objects have been exported. Click on the number to the completed title and the WMS record ID; *Failed* column shows how many objects failed export.

Image 35.1.1 Batch Export

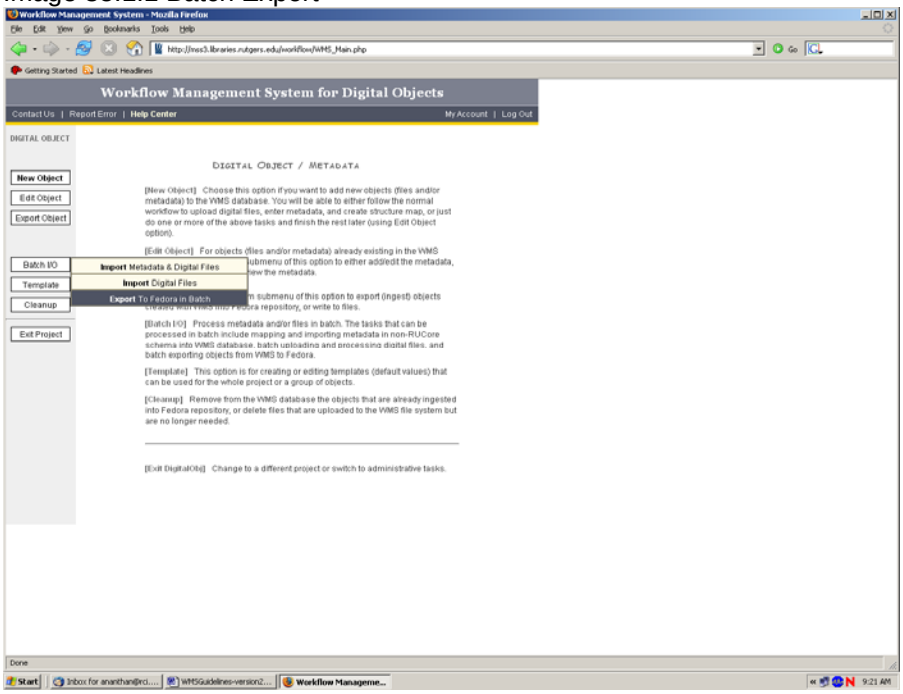
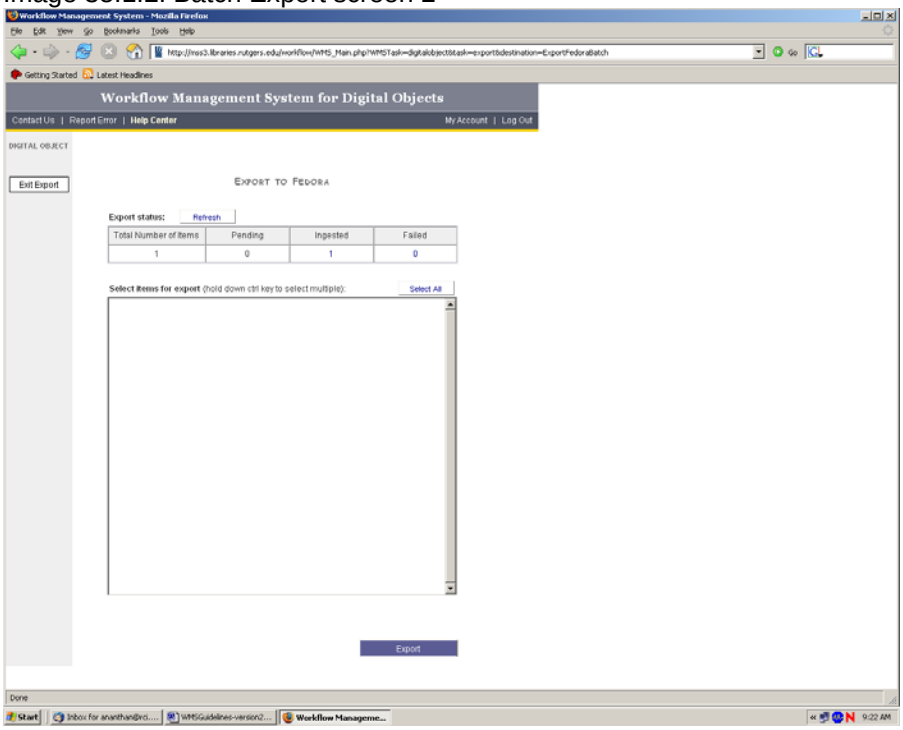


Image 35.1.2. Batch Export screen 2



Part VI: Acceptable File Formats

36. Master (Archival) Files

A) Original (the first digitized file)

1) Still Image (e.g. Photograph)
   - tiff

2) Sound
   - WAV
   - Transcript files in .txt, .rtf,.doc

3) Text (e.g. Book)
   - tiff

B) Modified original (copy derived from the original)

1) Still Image (e.g. Photograph)
   - tiff
2) Sound
   - WAV
   - Transcript files in .txt, .rtf, .doc

3) Text (e.g. Book)
   - tiff

37. Presentation (Access) Files

1) Still Image

   - PDF
   - JPEG
   - DjVu

2) Sound
   - MP3
   - Transcript in xml

3) Text (Book)
   - PDF
   - DjVu
   - OCRed XML